



Find Your Open Purchase Orders

1. Path: **CM UG UG** (list User's Financial User Groups). Select the Financial User Group you wish to access (arrow up to the User Group) and Press **Enter**

```

FIU715P1          ***** FINANCIAL SYSTEM *****
Feb 28,12          - List a User's Financial Groups -          12:16 PM

      USER NAME: ATHUKORALALAGE S WIJETUNGA
      ALL GROUP ACCESS: M

      GROUP      Access
      ID         Level      USER GROUP NAME
      -----
      ASDNSCI      M      ASSOC DEAN SCIENC-NO
      ASDNART      M      FINE & APPLIED ARTS
      6CCE-N       M      CORPORATE & CONTINUI
      6CCE-C       M      CORPORATE & CONTINUI
      SOC SCI      M      SOCIAL SCIENCE - CEN
                        *** End of Data ***

User ID: E024601
Direct command...:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      help  retrn quit      implo explo bkwrdr frwrdr      main
8035 - Position cursor or enter screen value to select
  
```

2. Press **Home** key on your keyboard to take you to the top of the action field. Select the Org Unit/Account Number you wish to access and type **PO** and press **Enter**

```

FIU725N1          ***** FINANCE SYSTEMS *****
Feb 28,12          - Browse Org Units for a Group -          1 more >

      State
      Action Org Unit  Qual 1  Location  Active
      -----
      PO  11110400  110400    20      A      BIOLOGY - A&P
      _  11110400  110402    20      A      ENVIRONMENTAL SCIENCE - A&P
      _  11111200  111200    20      A      HEALTH - A&P
      _  11111900  111900    20      A      PHYSICS - A&P
      _  11111900  111901    20      A      CHEMISTRY - A&P
      _  11111900  111902    20      A      PHYSICAL SCIENCE GENERAL - A&P
      _  11140800  140801    20      A      PHYSICAL EDUCATION - A&P
      _  11140800  140802    20      A      HEALTH EDUCATION - A&P
      _  11150500  150500    20      A      BUSINESS - A&P
      _  11150500  150501    20      A      ACCOUNTING - A&P
      _  11150500  150502    10      A      BUSINESS LAW - A&P

Group ID: ASDNSCI      State Org Unit:      Qual 1:      Location:
FISCAL YEAR:
Direct command...:
GL sum      DIsb reqs  DEpt reqs  POs
  
```

- Tab down to the **Status** line, and type **OP** and press **Enter**. All open purchase orders for the Org Unit/Account Number will display.

```

FIU725N1          ***** FINANCE SYSTEMS *****
F
FIU750N1          ***** FINANCIAL SYSTEMS *****          FIU750M1
Feb 28,12        - Search Purchase Orders by Account Number -    2 more >
A
-
      P.O.
Act Year  Number  Org Unit Qual1 Loc  GLC Qual2  Status  Type
-----
  2012  00000260  11110400 110400 20  64006  OP:OPEN  SC:SERVICE C
  2012  00000537  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000537  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000565  11110400 110400 20  65501  OP:OPEN  BO:BLANKET 0
  2012  00000766  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000801  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000801  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000801  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00002424  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
*Account Number: 11110400 110400 20
G  Buyer:  Status: OP Type:  Year:
F Direct Command:
D Display  Hist.  Items  Receivings
  
```

- Type **D** (display) on the action line on the purchase order you wish to view and press **Enter**

```

FIA630P1          ***** FINANCIAL SYSTEMS *****          FIA630M1
F
FIU750N1          ***** FINANCIAL SYSTEMS *****          FIU750M1
* Feb 28,12        - Search Purchase Orders by Account Number -    2 more >
*
      P.O.
Act Year  Number  Org Unit Qual1 Loc  GLC Qual2  Status  Type
-----
  2012  00000260  11110400 110400 20  64006  OP:OPEN  SC:SERVICE C
d  2012  00000537  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000537  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000565  11110400 110400 20  65501  OP:OPEN  BO:BLANKET 0
  2012  00000766  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000801  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000801  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00000801  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
  2012  00002424  11110400 110400 20  65501  OP:OPEN  PO:STANDARD
*Account Number: 11110400 110400 20
  Buyer:  Status: OP Type:  Year:
Direct Command:
D Display  Hist.  Items  Receivings
E
  
```

- Press **PF5** (ITEMS) to view the item(s) on the Purchase order

```

FIA630P1          ***** FINANCIAL SYSTEMS *****          FIA630M1
Feb 28,12          - State of a Purchase Order -                  3:35 PM

*Action (C,D)      _

*PO Number: 2012 00000537  Type: PO STANDARD PURCHASE  Entry Date: 07/21/11

Vend Nbr.: 911319190  Addr: 1          Buyer ID...: JAW JOHN WORK
Vend Name.: SARGENT-WELCH              Status.....: OP  OPEN
Attention.: PBCC ACCOUNT #: 2175193    Print Date.: 07/21/11
Suite.....:                          Needed by...: 08/04/11
P.O.Box...: P 0 BOX 4130              Pay Terms...: 30  NET 30 DAYS
Street....:                          FOB Terms...: DES FOB DESTINATIO
City,St,Zp: BUFFALO, NY 14217         Tolerance...: 02  $50 TOLERANCE
Phone/Fax.: 8007274368 / 8006762540   Tot Cal Amt: 1799.62
                                         Tot Enc Bal: 18.60
PrePay&Add:                          Paid Amt...: 1781.22
                                         Freight....: 27.26
                                         Fr.Itm.Nbr.: 2

Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      help retrn quit DTL  ITEMS                      main
8026 - P.O. Header 2012-00000537 displayed successfully
  
```

- Notice the status of each item

```

FIA630N3          ***** FINANCIAL SYSTEMS *****          3:38 PM
Feb 28,12          - State of a Purchase Order -

Purchase Order: 2012-00000537
Item
Nbr  Description          Received Invoiced Payable  Financial
-----
 1  MOMENT OF FORCE APPARATUS, ITEM CP313  COMPLETE COMPLETE COMPLETE ENCUMBER
 2  CARBON ROD,ITEM WLC94922-08          COMPLETE COMPLETE COMPLETE ENCUMBER
 3  COPPER, ITEM WL2210                  COMPLETE COMPLETE COMPLETE ENCUMBER
 4  NICKEL, ITE WLC94196-01              COMPLETE COMPLETE COMPLETE ENCUMBER
 5  ZINC, ITEM WL2206                   COMPLETE COMPLETE COMPLETE ENCUMBER
 6  IRON, ITEM WLC92618-02              COMPLETE COMPLETE COMPLETE ENCUMBER
 7  HYDROGRAPHIC RELIEF GLOBE, ITEM WL688  COMPLETE COMPLETE COMPLETE ENCUMBER
 8  WORLD OCEAN RELIEF GLOBE, ITEM WL6888  COMPLETE COMPLETE COMPLETE ENCUMBER
 9  IRON CHLORIDE 1.0 M, ITEM WLC97026-07  COMPLETE COMPLETE COMPLETE ENCUMBER
10  IODINE SOLUTION, ITEM WLC97047-07      COMPLETE COMPLETE COMPLETE ENCUMBER
11  IODINE, ITEM WLC97043-04            PARTIAL PARTIAL PARTIAL ENCUMBER
      +                      +                      +

Itm Nbr: _____
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      help retrn quit                      bkwrđ frwrđ                      main
8035 - Position cursor or enter screen value to select
  
```

The possible statuses:

- **OP** (Open) – The item is open
- **PE** (Pending) – The item has not been received or paid
- **PT** (Partial) – Partial receipt of item or partial payment
- **CM** (Complete) – The item is received or payment is paid in full

Notice the **Description**, **Received**, and **Invoiced** columns. To view more information about each item under each column you must: tab to the green + (plus) sign, and then arrow up to the item you wish to view and press **Enter**. To return to the previous panel press **PF2**. If you have more than one page of items, use **PF8** to scroll forward and **PF7** to scroll backwards.

```

FIA630N3          ***** FINANCIAL SYSTEMS *****
Feb 28,12          - State of a Purchase Order -          3:46 PM

Purchase Order: 2012-00000537
Item
Nbr  Description                      Received Invoiced Payable Financial
-----
  1  MOMENT OF FORCE APPARATUS, ITEM CP313 COMPLETE COMPLETE COMPLETE ENCUMBER
  2  CARBON ROD,ITEM WLC94922-08      COMPLETE COMPLETE COMPLETE ENCUMBER
  3  COPPER, ITEM WL2210              COMPLETE COMPLETE COMPLETE ENCUMBER
  4  NICKEL, ITE WLC94196-01          COMPLETE COMPLETE COMPLETE ENCUMBER
  5  ZINC, ITEM WL2206                COMPLETE COMPLETE COMPLETE ENCUMBER
  6  IRON, ITEM WLC92618-02           COMPLETE COMPLETE COMPLETE ENCUMBER
  7  HYDROGRAPHIC RELIEF GLOBE, ITEM WL688 COMPLETE COMPLETE COMPLETE ENCUMBER
  8  WORLD OCEAN RELIEF GLOBE, ITEM WL6888 COMPLETE COMPLETE COMPLETE ENCUMBER
  9  IRON CHLORIDE 1.0 M, ITEM WLC97026-07 COMPLETE COMPLETE COMPLETE ENCUMBER
 10  IODINE SOLUTION, ITEM WLC97047-07 COMPLETE COMPLETE COMPLETE ENCUMBER
 11  IODINE, ITEM WLC97043-04        PARTIAL PARTIAL PARTIAL ENCUMBER
                                     +
Itm Nbr: 11_
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      help  retrn quit                      bkwrfd frwrd                      main
8035 - Position cursor or enter screen value to select
  
```

```

FIA610N6          ***** FINANCIAL SYSTEMS *****
Feb 28,12          - Browse Receivings -          3 more >

Purchase Order: 2012-00000537
      PO      Item Rec      Date      Recieved      Exception      Total
      Year   Number  Nbr  Nbr Received  To Date      Types      Exceptions
-----
2012 00000537   6    1  09/23/11    4.0000
                *** End of Data ***

Rec Seq Nbr: ____
Direct command...: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      help  retrn quit                      bkwrfd frwrd                      left right main
8004 - End of data reached, enter new start value
  
```

Once you have reviewed the purchase order, you need to determine the next step depending on the status:

1. **If the item is in a PE – Pending status, and you have not received the item**, you should contact the vendor to find out the status of that item and when it will be shipped.
 2. **If the item is in a PE – Pending status, and you have physically received it**, you should email your receiving department on your campus and ask them to receive that item (include in the email the purchase order number and item numbers for that specific PO).
 3. **If the item is in at PT – Partial status**, then contact the vendor to see if they are shipping the balance. If the vendor is shipping the balance, then leave the item alone. If the vendor isn't, then email [Purchasing](#) to close the item (when emailing the Receiving or Purchasing Department please include the Purchase Order number and the specific item number that need to be changed or closed).
 4. **If the item(s) is received but the payment status displays PE – Pending status**, then the item has not been paid. Please call the vendor to request a copy of the invoice. Send the invoice to [Accounts Payable](#), MS#59.
 5. **If the item is received in full but the payment status displays PT – Partial status**. Then call the vendor to request a copy of the invoice. Send the invoice to [Accounts Payable](#), MS#59.
 6. **If the PO is in various statuses**, but nothing else is going to occur with is order and you consider the order complete as is, then email the [Purchasing](#) Department to close the purchase order.
 7. **If the items are all received and paid but the purchase order is not closed**, email [Purchasing](#) to have the purchase order closed in its entirety.
7. To view the next purchase order press **PF2** twice to return to the list of your POs and repeat steps 4 - 6 to review the rest of your open purchase orders for the Org Unit/Account Number. If you have more than one page of POs, use **PF8** to scroll forward and **PF7** to scroll backwards. Once you have finished viewing all the PO's for an Org Unit/Account Number or the Financial User Group, then follow the above steps for the next Org Unit/Account Number or Financial User Group.