

## Purchase Order Maintenance for Your Location

Maintaining your purchase order status is important and also beneficial.

Examples are:

1. *Order was not received from the vendor or may not be complete. Contact the vendor if needed.*
2. *PO receivers that need to be entered.*
3. *An existing balance after the invoice(s) have been paid and order is complete and can be closed. The current year funds would be put back into that g/l for you to use before school year end close.*

### Purchase Order Closure

1. Ensure a receiver has been entered for all the merchandise that was received
2. All invoices must be attached and Accounting must have printed the check.
3. Send an email to [nmcfadden@nps.k12.va.us](mailto:nmcfadden@nps.k12.va.us) requesting that the P.O. be closed. If there is any funds left of the PO you must indicate why. Examples: the item has been discontinued, item on sale, etc.

*Of course any purchase orders with no receiver you need to research. Forward any invoices to Accounting or call the vendor if there are items that haven't been delivered.*

### Steps to check on your purchase orders

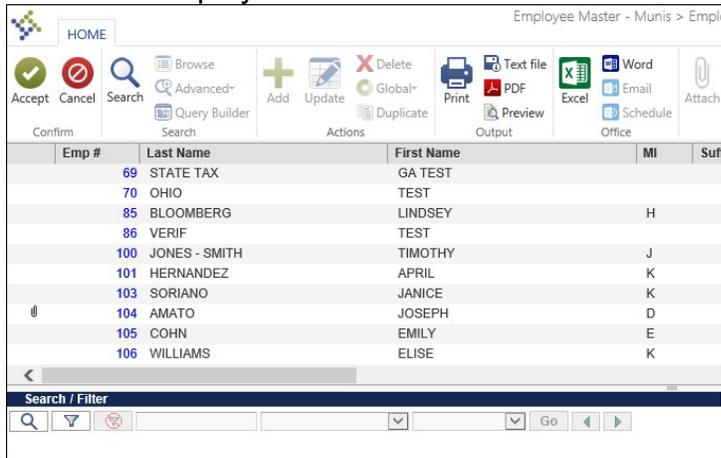
There are several ways to find existing records in Munis programs. Most commonly, click Search on the ribbon, complete location fields, and then click Accept to create an active set of records that match the search criteria.

Click Browse in the Search group of the ribbon to view a list of all results.

The screenshot shows the Munis software interface. At the top, there is a ribbon with various buttons. The 'Search' group contains buttons for 'Accept', 'Cancel', 'Search', and 'Browse'. The 'Browse' button is highlighted with a red box. Below the ribbon, there is a form titled 'Employee Identification' with fields for Employee, SSN, Last Name, and First Name. The employee ID is 4, SSN is 456-79-7209, Last Name is JONES, and First Name is TIM. Below this, there is a 'Main' ribbon with tabs for Dates, Demographics, Address, Payroll, Mail Sort, Last Change, User Defined, and Benefit FTEs. The 'Employee Information' section is expanded, showing fields for Job Class (FAC4 ACCOUNTANT III), Location (135 FINANCE DEPARTMENT), Group/BU (10 NON UNION), Pay Frequency (W - WEEKLY), Project Account (11135000 5110), and Org/Obj/Proj (SALARIES FULL TIME - CHANGE). There are also checkboxes for 'New Employee' and 'Substance Screening Pool'. At the bottom, there is a navigation bar with 'K <' and '> K' buttons, and '1 of 11' in the center.

## Browsing Records

Once you have created an active set of records within a Munis program, click **Browse** to display the collected data in a table format.



The screenshot shows the 'Employee Master - Munis > Empl' interface. At the top, there is a 'HOME' button and a navigation bar with various icons: Accept, Cancel, Search, Browse, Advanced Search, Add, Update, Delete, Global, Duplicate, Print, Text file, PDF, Excel, Word, Email, Attach. Below the navigation bar is a table with the following columns: Emp #, Last Name, First Name, MI, and Suf. The table contains 11 rows of employee data. At the bottom, there is a 'Search / Filter' section with a search bar and navigation buttons.

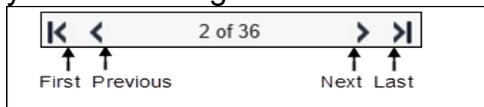
Emp #	Last Name	First Name	MI	Suf
69	STATE TAX	GA TEST		
70	OHIO	TEST		
85	BLOOMBERG	LINDSEY	H	
86	VERIF	TEST		
100	JONES - SMITH	TIMOTHY	J	
101	HERNANDEZ	APRIL	K	
103	SORIANO	JANICE	K	
104	AMATO	JOSEPH	D	
105	COHN	EMILY	E	
106	WILLIAMS	ELISE	K	

## Managing Selected Records

An active set consists of records with information matching your search criteria. You create an active set when you complete a search that produces multiple records that you can navigate and view.

At the bottom of a program screen, a navigation bar displays the number of the record that you are currently viewing, the total number of records, and options to assist you with navigation.

You can view records in the active set one at a time or you can click **Browse** on the navigation bar to view a list of all records in the active set. In the following example, you are viewing record 1 of 36.



To navigate the active set of records:

- Click **First** to view the first record in the active set (record 1).
- Click **Previous** to view record 2 of 36.
- Click **Next** to view record 3 of 36.
- Click **Last** to view the last record in the active set (record 36).

The active set remains active until you perform another search or close the program.

**Note:** The Attachments button displays in the navigation bar according to the parameters defined in the System Administration Site Settings program. If the Remove the Indicator from Application Main Screens check box is selected on the General tab of the Site Settings program, the Attachments button is not available in the navigation bar.