

PS Financials 9.2

Open PO Report



1. Click the Purchase Order Inquiry.

A screenshot of the "Purchase Order Inquiry" page in the PS Financials 9.2 system. The page has a dark red header with "Staff Homepage" on the left and "Financials & Annual Budget" on the right. A left-hand navigation menu contains several items, with "Purchase Order Inquiry" highlighted in green and a blue arrow pointing to it. The main content area shows a search form with fields for "PO Number", "Vendor", "Fund Code", "Department", "Project", and "Account", each with a magnifying glass icon. There is also a "Fiscal Year" field and a "Show Open Only" checkbox. "Search" and "Clear" buttons are at the bottom of the form. Below the form is a "PLEASE NOTE" section with a warning about encumbrance amounts and a contact email: procurement@psysound.edu. At the bottom of the page are "Save" and "Notify" buttons.

2. The Purchase Order Inquiry page provides quantity, pricing and description details for all purchase orders charged to budget, along with capability to restrict results to purchase orders with existing encumbrances. Please remember that Purchase Order numbers have leading zeroes to make a 10 digit number (e.g. 0000005375)
3. Click in the Fiscal Year field and enter the desired information. For this example, please enter "2022".

Staff Homepage Financials & Annual Budget

Chartfield Value Lookup | Purchase Order Inquiry

Annual Budget | Results for: wvu

Carryover Projects | Search Criteria

Grants and Projects | PO Number: Vendor:

Purchasing & Payables Inquiry | Fund Code: Department:

My Requisitions | Project: Account:

Create Requisition | Fiscal Year: 2022

Requisition Inquiry | Show Open Only:

Purchase Order Inquiry | Search Clear

Temporary Requisition Approver | Save Notify

Wells Fargo P-Card Portal

Forms

PLEASE NOTE: The "Show Open Only" checkbox limits the results to display purchase orders where encumbrance amounts exist but does not provide the actual encumbrance amount at this time. Contact procurement@ougetsound.edu to determine the actual encumbrance amounts.

- Click in the Department field and enter the desired information. For this example, please enter "7101". This example uses department, however, you can also search by Project if that is more appropriate. If you are responsible for multiple departments and/or projects, you can leave this field blank and the tool will return results for all of the budgets in one list.

Staff Homepage Financials & Annual Budget

Chartfield Value Lookup | Purchase Order Inquiry

Annual Budget | Results for: wvu

Carryover Projects | Search Criteria

Grants and Projects | PO Number: Vendor:

Purchasing & Payables Inquiry | Fund Code: Department: 7101

My Requisitions | Project: Account:

Create Requisition | Fiscal Year: 2022

Requisition Inquiry | Show Open Only:

Purchase Order Inquiry | Search Clear

Temporary Requisition Approver | Save Notify

Wells Fargo P-Card Portal

Forms

PLEASE NOTE: The "Show Open Only" checkbox limits the results to display purchase orders where encumbrance amounts exist but does not provide the actual encumbrance amount at this time. Contact procurement@ougetsound.edu to determine the actual encumbrance amounts.

- Click the Show Open Only option and then click Search.

Staff Homepage Financials & Annual Budget

- Chartfield Value Lookup
- Annual Budget
- Carryover Projects
- Grants and Projects
- Purchasing & Payables Inquiry
- My Requisitions
- Create Requisition
- Requisition Inquiry
- Purchase Order Inquiry**
- Temporary Requisition Approver
- Wells Fargo P-Card Portal
- Forms

Purchase Order Inquiry


Results for: wvu

Search Criteria

PO Number	Vendor
Fund Code	Department 7101
Project	Account
Fiscal Year 2022	
Show Open Only: <input checked="" type="checkbox"/>	

PLEASE NOTE: The "Show Open Only" checkbox limits the results to display purchase orders where encumbrance amounts exist but does not provide the actual encumbrance amount at this time. Contact procurement@pugetsound.edu to determine the actual encumbrance amounts.

Save Notify

- The following steps explain how to download a list to Microsoft Excel. This list can be sent to Procurement to assist with any needed clean-up. Click the Download to Excel graphic .
- Click the OK button.
- Click the Yes button.
- Click File and Save As and browse to your desired location and enter a filename you will remember.
- Click the Save button at the bottom of the page to keep your new document.
- Click the Clear button. Congratulations! You have created an open PO report.