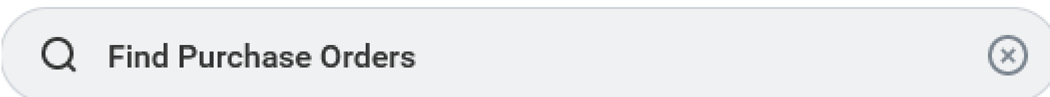
Purchase Order Information

This is a guide for campus users to find purchase orders.

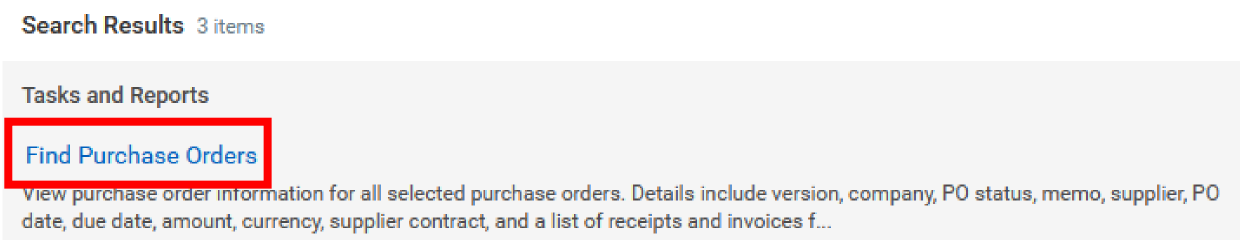
Find Purchse Order Report

When to use: The following will show you how to locate purchase order information that you or someone in your department requested.

Step 1) Search for the "Find Purchase Order" report in the search box



Step 2) Click on "Find Purchase Orders" report.



Step 3) Search: This report has very robust search options. You are able to search for your PO by any one or any combination of the following fields:

- Supplier
- Buyer (purchasing agent)
- PO Type
- PO #
- Date/Date range
- Status
- Requisition
- Requisition Type
- Requester (you or someone in your department)
- Invoice #
- Worktags
- Etc.

Notes:

- *The starting date range defaults to one month prior to the current date. If you need to find a PO that is older than one month, please adjust the date.*

- *The "Contract" field does not search for the CRS/Mines Contract that is associated with the PO. This field searches for the Workday Contract that is associated with the PO – Mines is not currently using this feature.* ***This field should be ignored.***

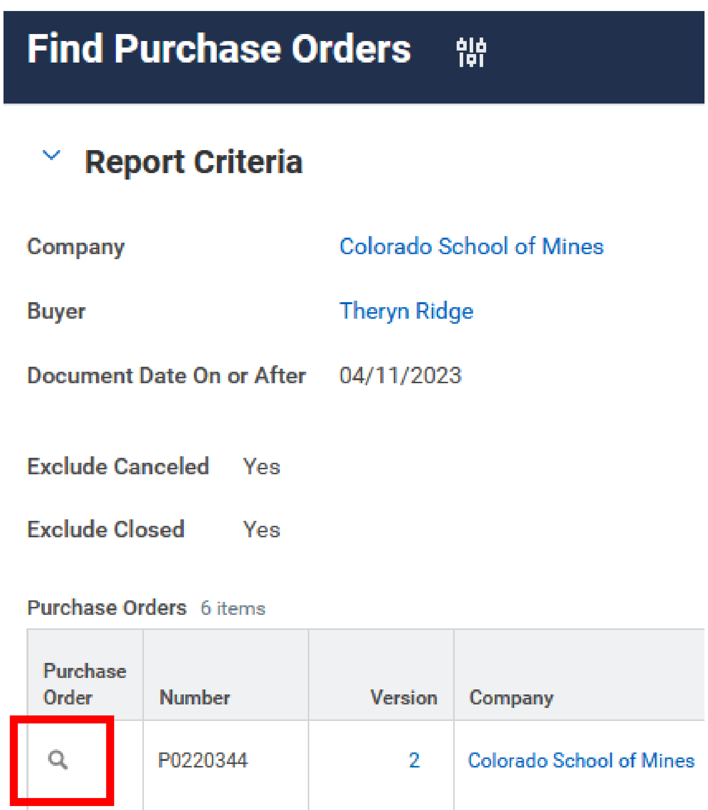
Step 4) Interpretation - The report will display the PO#, version, PO type, Status, buyer, supplier, order-from-connection, date, amount and REQ Type.

Version Interpretation

-Blank-	If there is no version listed, this indicates the PO does not have a change order. It is the original PO.
1	Version 1 indicates that a change order has been done to the PO. It now has version 0 (original) and version 1 is the update version.
2	Version 2 indicates that two change order have been done to the PO. It now has a version 0 (original), version 1 (the first CO) and version 2 is the latest version.
99	Version 99 would indicate that there are one hundred versions of the PO (the original PO plus 99 change orders).

"Order-From Connection" is the "Supplier Address."

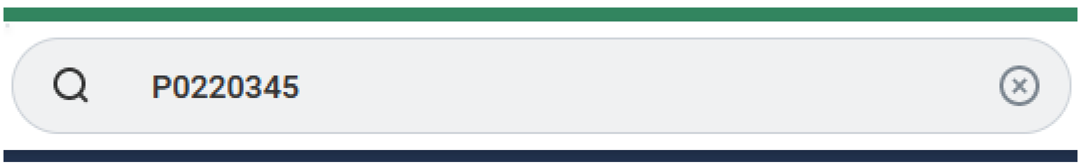
Step 5) Retrieving Additional Data – To retrieve information beyond the fields listed in step 4, select the magnifying glass button. This will open the "View Purchase Order" Report.



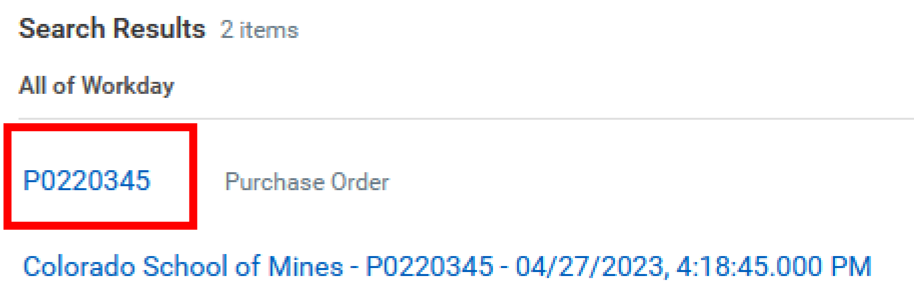
View Purchase Order Report

When to use: If the **"Find Purchase Order"** summary data does not provide enough information, use this report to view the full PO information.

Step 1: Navigating to Report - To get to the **"View Purchase Order"** report either follow steps 1 – 5 for the "Find Purchase Order" report or, if you have your PO#, enter the PO# in the search bar.

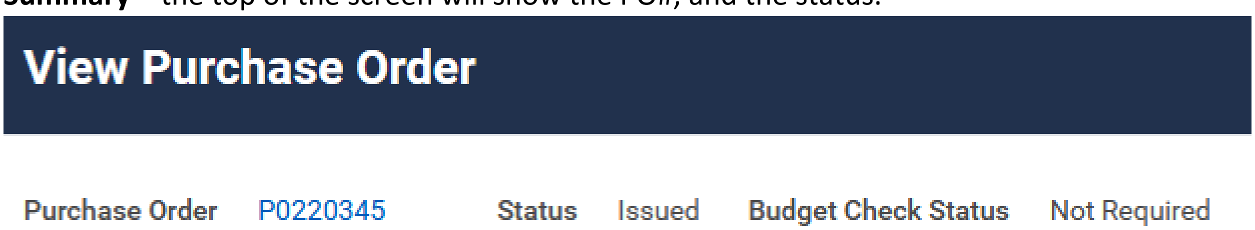


The click on the PO link.



Step 2: **Interpretation**

Summary – the top of the screen will show the PO#, and the status.



Status Interpretation

Draft	The PO has been created, but has not been submitted.
In progress	The PO has been submitted and send for approval.
Approved	The PO has been approved, but not issued.
Issued	The PO has been completed and is active in Workday. The PO document has been printed and can be sent to the vendor.

Closed	The PO is closed.

Summary – Shows the summary details such as the supplier, address, date and amount.

Summary

Company	Colorado School of Mines
Purchase Order Type	Regular
Supplier	Alazar Technologies, INC
Order-From Connection	6600 Trans-Canada Highway-A0020
Currency	USD
Document Date	04/25/2023
Line Total Amount	1,000.00
Requisition Type	Regular

Term and Taxes – Shows payment terms. Below are the default fields, so they will not change.

Terms and Taxes

Payment Terms	30 Days
Due Date	(empty)
Default Payment Type	Check
Override Payment Type	(empty)
Credit Card	(empty)
Shipping Terms	F.O.B. Destination, Freight Prepaid and Added
Shipping Method	(empty)
Shipping Instructions	(empty)
Supplier Contract	(empty)

Contact Information – Shows the purchasing agent, requestor and contract # (if applicable).

MINES

Contact Information

Issue Option	Email
Supplier PO Issue Email	(empty)
Buyer	Purchasing Agent
Bill-To Contact	Danielle Davis
Bill-To Contact Detail	Danielle Davis
Bill-To Address	1500 Illinois St. Golden, CO 80401 United States of America
Ship-To Contact	Requestor
Ship-To Contact Detail	Cherie Dardano
Ship-To Address	1301 19th Street Golden, CO 80401 United States of America
Memo	Contract #
Internal Memo	(empty)

Bottom Tabs – the bottom has four tabs with information.

1. **Services lines** – shows the line item (services/goods) information.
2. **Retention Terms** – shows retention info such as percentage and amount.
3. **Process History** – shows the process events such as creation and required approvals and their current status.
4. **Attachments –** shows all documents attached to the REQ such as request email, quote, purchase justification, etc.
5. **Printing Runs –** shows the issue date and the PO hyperlink to PDF document.
6. **Balances**

Obligation Amount	Amount encumbered
Obligation Amount Liquidated	Liquidation/spend amount
Obligation Amount Remaining	Balance