



# EPIC

## Electronic Procurement and Invoicing Center

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**You can generate a list of your open purchase orders in either EPIC or the IUIE.**

### Closing Purchase Orders

As we near year-end, you may find that you need to close some of your open purchase orders. Some reasons that a PO needs to be closed are: the PO is complete because the goods/services have been delivered, or the remaining goods/services will not be delivered and the encumbrance needs to be released.

If a PO needs to be closed, you may do so using the “close order” button at the bottom of the purchase order document. This action requires a note explaining why the order is being closed. When the order is successfully closed, the explanation, the date, and your name will be added to the purchase order notes. The outstanding encumbrance(s) will be released overnight when the general ledger is updated.

If you are unable to close a PO for any reason, please feel free to contact your Purchasing Department for assistance. ■

### Generating a List of Your Open Purchase Orders

A lot of requests have been coming into Purchasing about how a list of “open” purchase orders for an organization can be generated. There are a couple of ways that this can be accomplished. The method that will work for your organization depends upon the number of orders that will be found as the result of a search.

1. Within EPIC the “Search for Documents” link will produce a list of “open” purchase orders if the following steps are taken:
  - Select the “Purchase Order” tab
  - Select the Chart and enter the Org code in the Chart/Org fields
  - Select the PO Status “Open”

- Select the Search button.

This search will return only 100 purchase orders; therefore organizations that generate a lot of purchase orders will not get a complete list. The search results display only 30 orders per page -- it may take several screens to view the entire list. If “*Search Results: 100 found. Displaying 1 to 30*” displays after the search is complete, there are probably more than 100 open purchase orders.

2. There are several reports in the IUIE that will provide a complete list of orders and the output will produce an Excel



## Generating a List of Your Open Purchase Orders (cont...)

spreadsheet. The “Purchase Order Summary with Spend” is a good report that should answer most questions. To execute the report:

- Log into the IUIE
- Select Master Catalog
- Select the Financial/EPIC – Department Resources/Purchase Order folders
- Select “Purchase Order Summary with Spend” report object
- In the parameters selection type in OPEN in the “Purchase Order Status Code” field, your chart in the “Requisition’s Chart” field and your organization code in the “Requisition’s Organization” field (parameters are in alphabetic order).
- Select the columns that you would like to return or select the

“All Columns” radio button. Extra columns can be removed after the results are returned.

- Select the “MS Excel (XLS)” radio button
- Change the “Maximum Number of Rows to Return” radio button from 100 to No Limit.
- The “Run” button can be selected or if you anticipate that this report will be used in the future you should select the “Save Settings” button and all the selections made above will be saved and placed into “My Catalog”.

If you have problems with any of these procedures please contact your Purchasing Department for assistance. ■

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## EPIC Patch

As of June 21, 2007 some attributes of a purchase order type vendor are no longer editable – these are the tax number, ssn/fein indicator, ownership type, supplier diversity values and the debarred indicator. All of these attributes can be added when entering a new vendor. ■

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- Sending an e-mail to : [listserv@indiana.edu](mailto:listserv@indiana.edu)
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