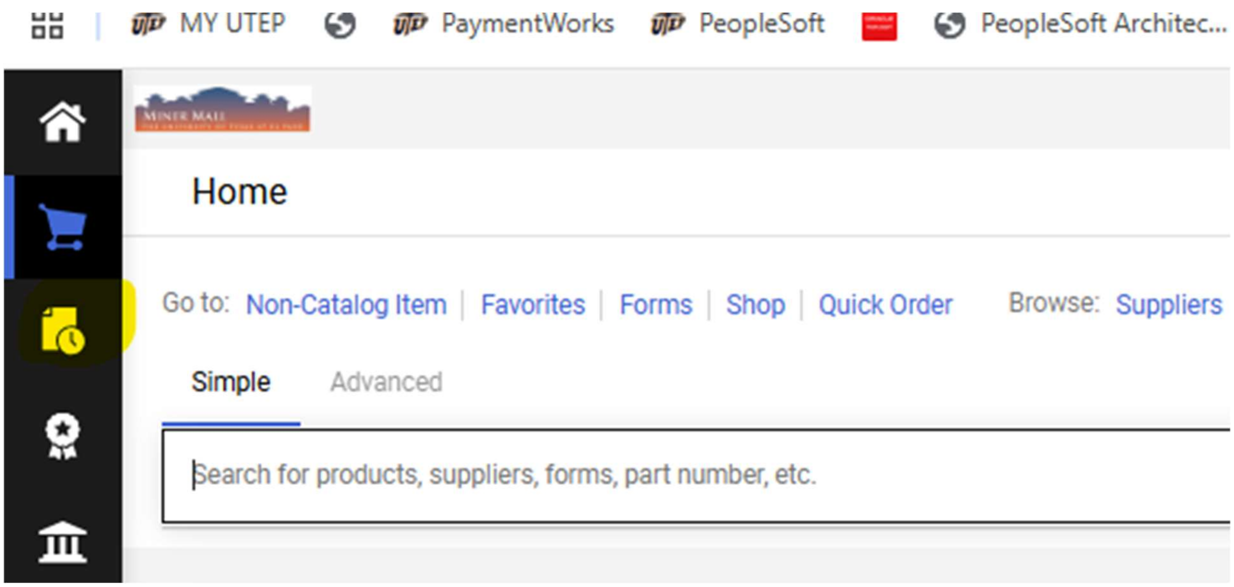
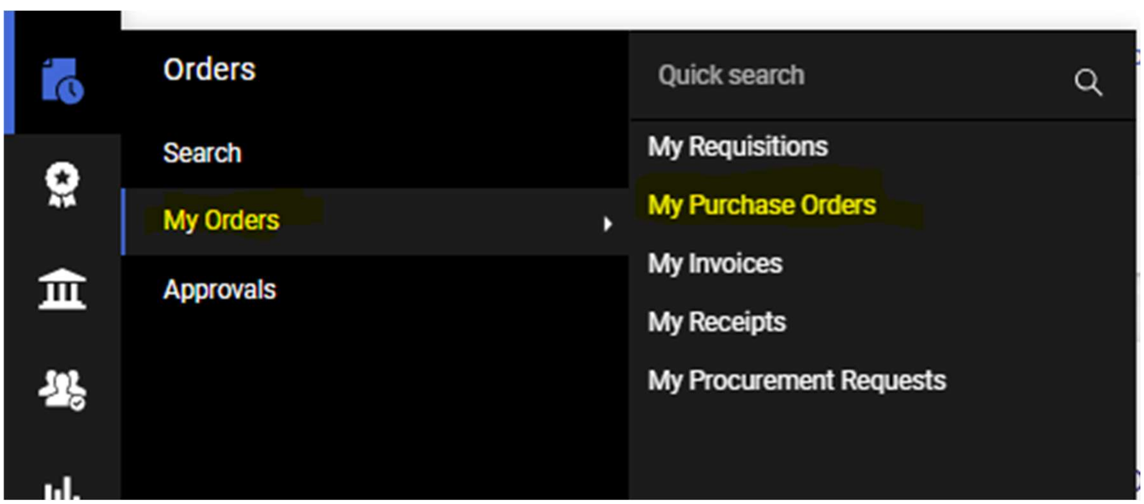
REFERENCE GUIDE: HOW TO CREATE A REPORT IN MINER MALL

Purpose: This document provides instructions for UTEP users on creating a report in Miner Mall which displays the POs which require a cost or quantity receipt to be created. Receipts are required for vouchers to be final approved and processed for payment.

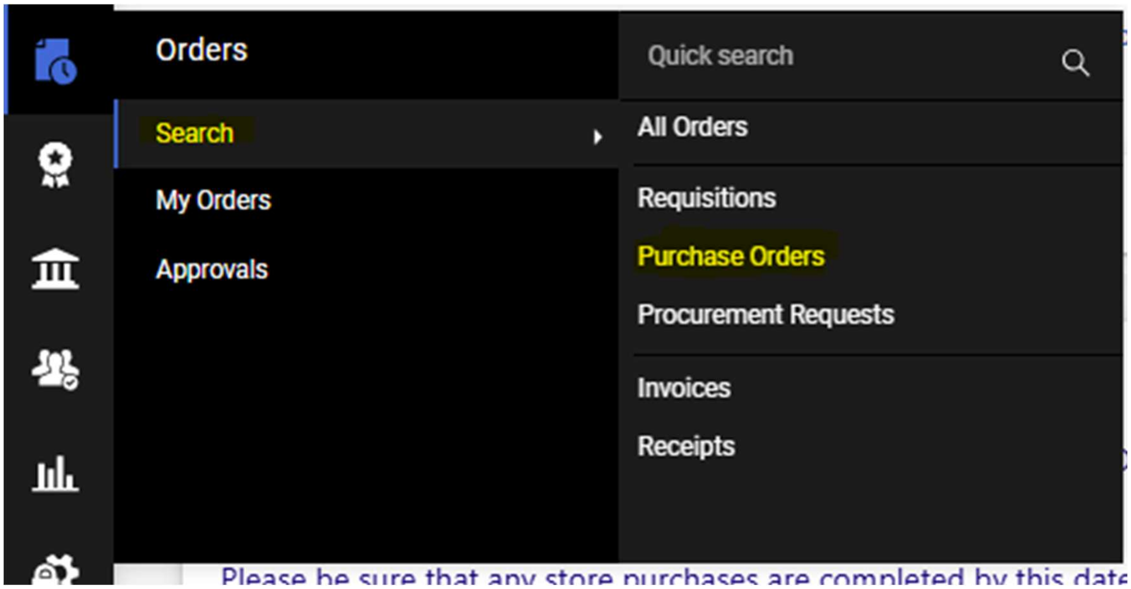
1. Click on **Document** with clock, located on the left side banner of Miner Mall



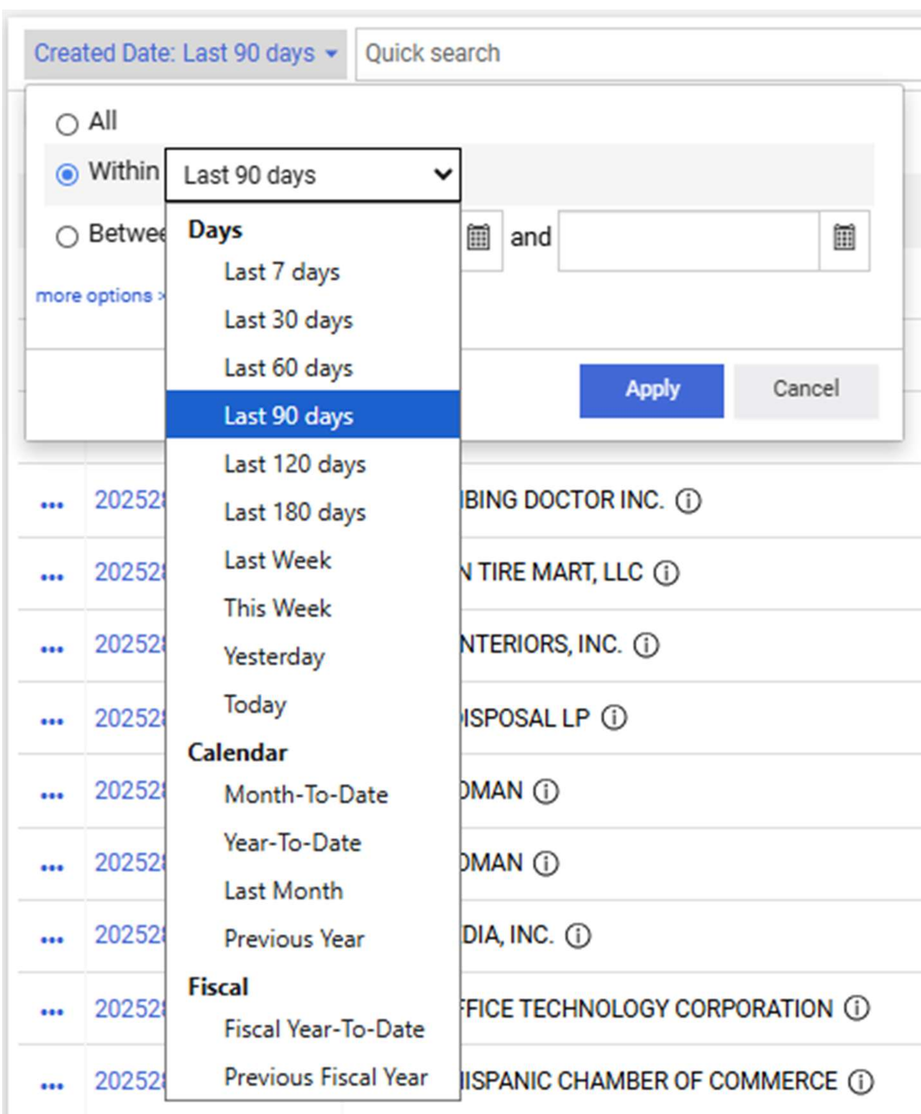
2. Purchase orders can be searched in two different ways.
   a. If you create POs, you can select **My Orders** and then **Purchase Orders**



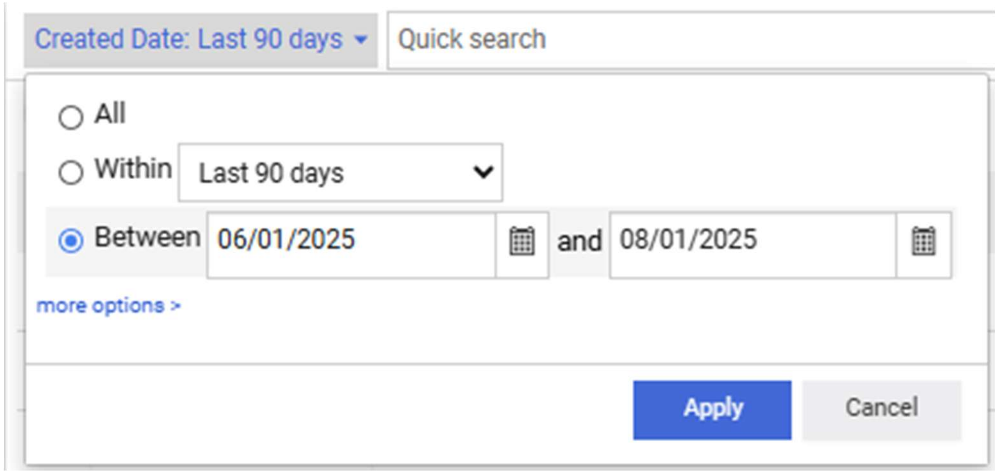
   b. To search for all POs created, select **Search** and **Purchase Orders**



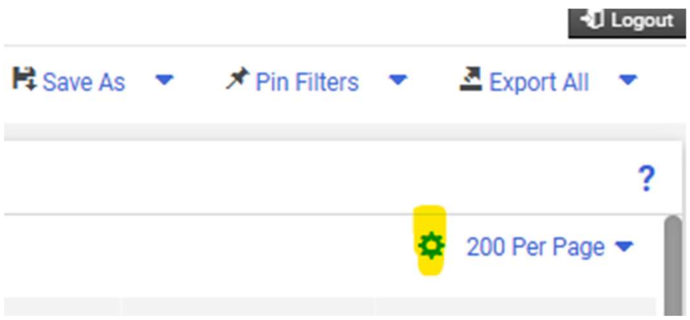
3. To determine the **Date Range** of the POs shown, click on **Created Date** and select the desired range.



   a. If needed, you can also enter a specific date range, by selecting different dates in the "**Between**" section

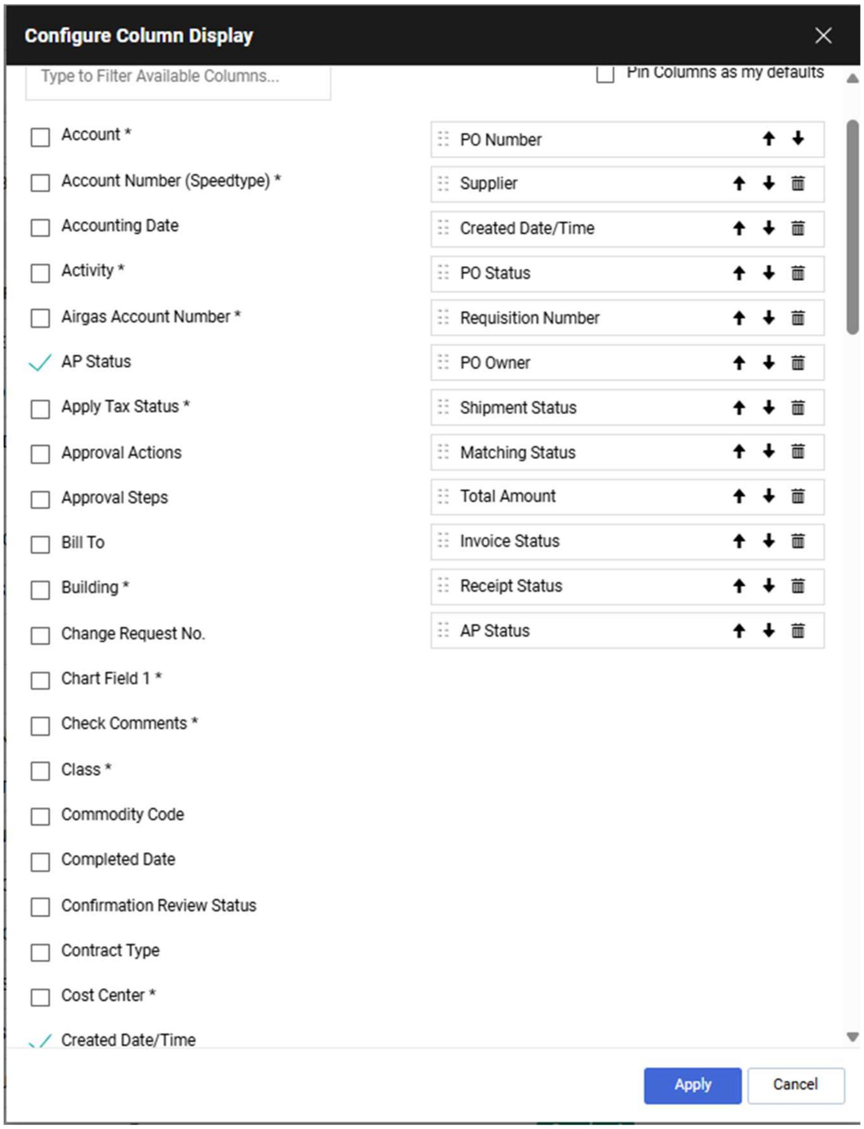


4. On the top right corner, click on the star to add/remove columns.

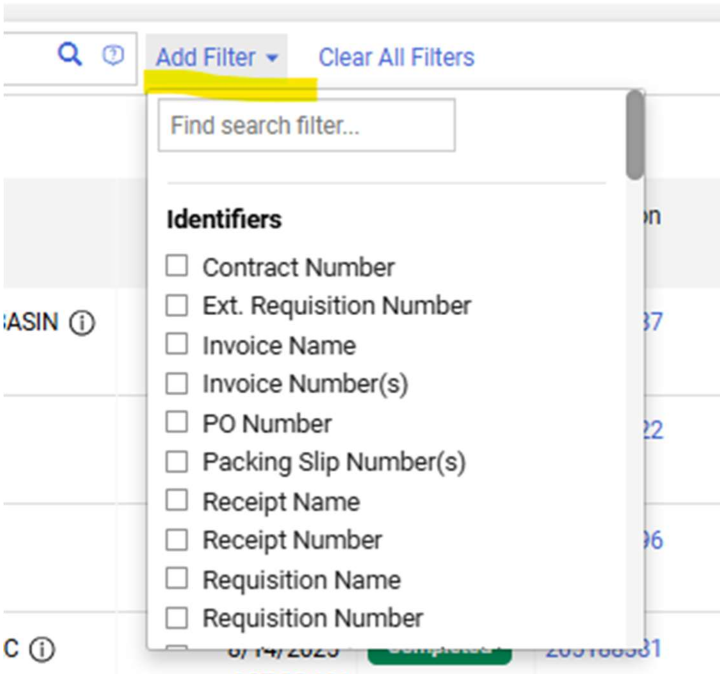


   a. You can add as many columns as needed, but to find POs that have not been received, select the following columns:
      i. **Invoice Status** - will show if PO has been invoiced yet.
      ii. **Receipt Status** - will show if PO has been received in system
      iii. **AP Status** – will show is Open, Soft Closed or Closed status
      iv. **Prepared by** – will show who created the PO

5. Sort the columns in the desired order. Once all the needed columns have been added/removed and sorted in the order department wants, click **Apply**

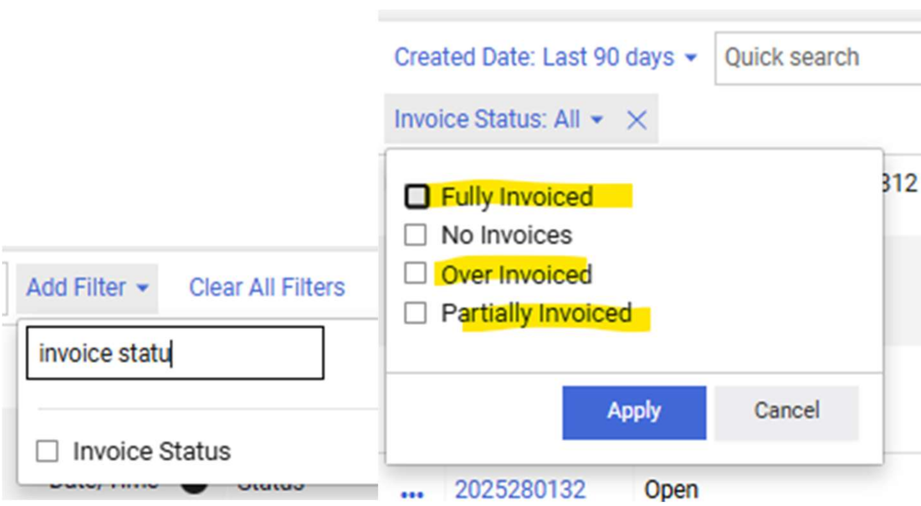


6. To start Filtering the POs, click on “**Add Filter**” and search for the needed columns you want to filter.

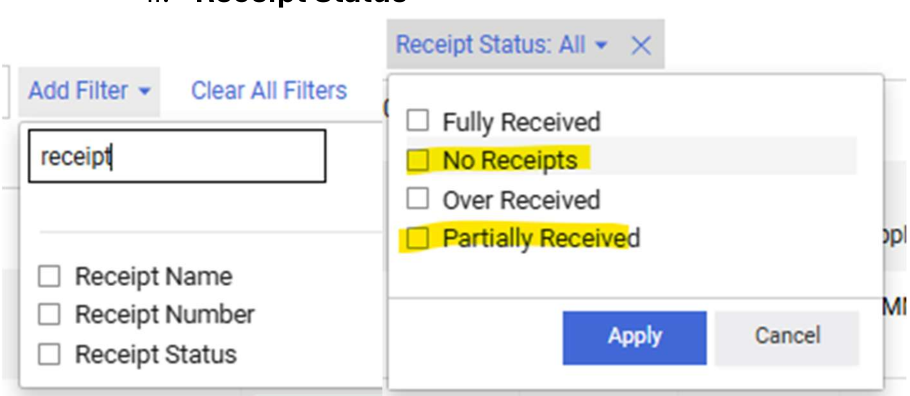


a. Add the following filters

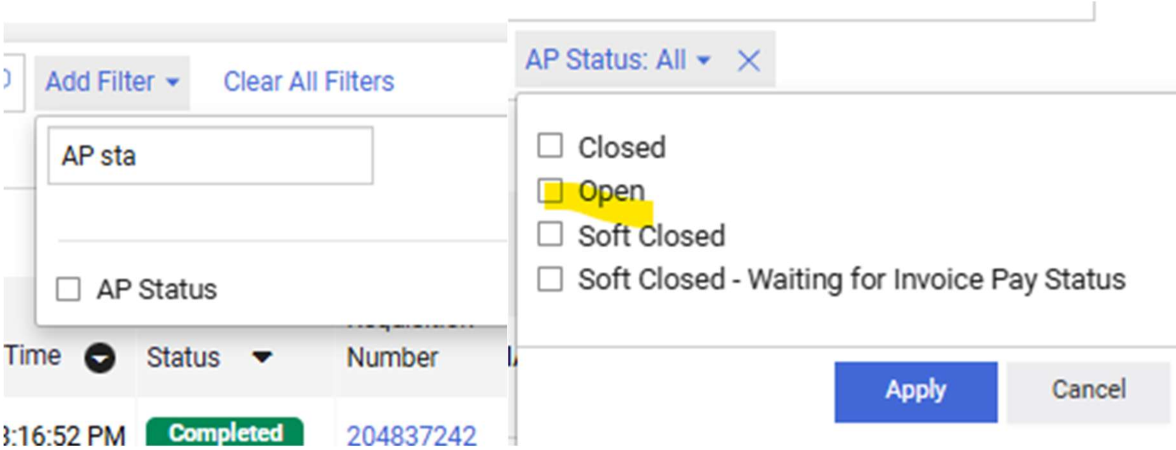
i. **Invoice Status**



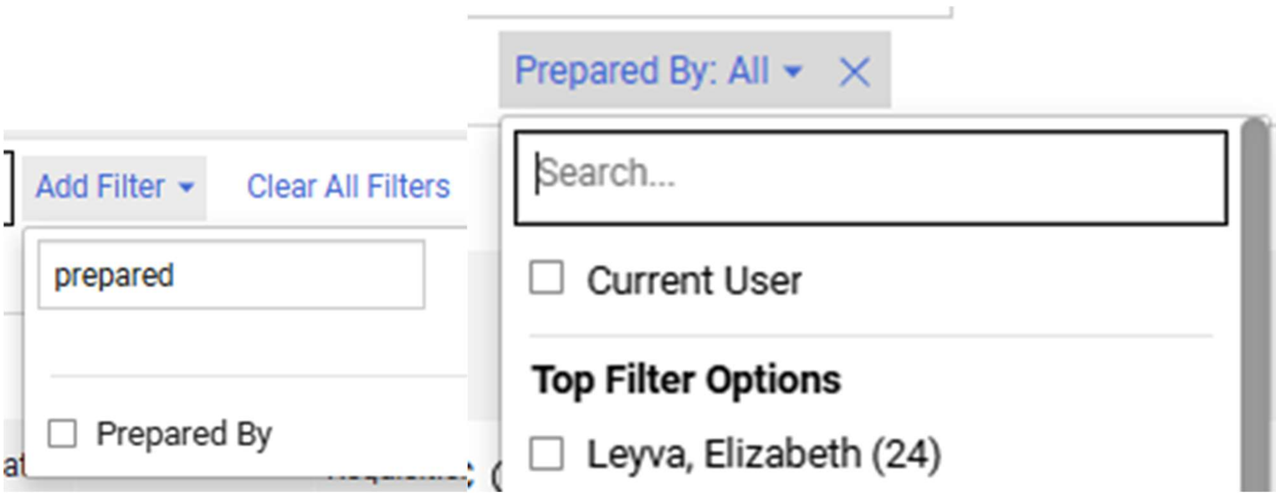
ii. **Receipt Status**



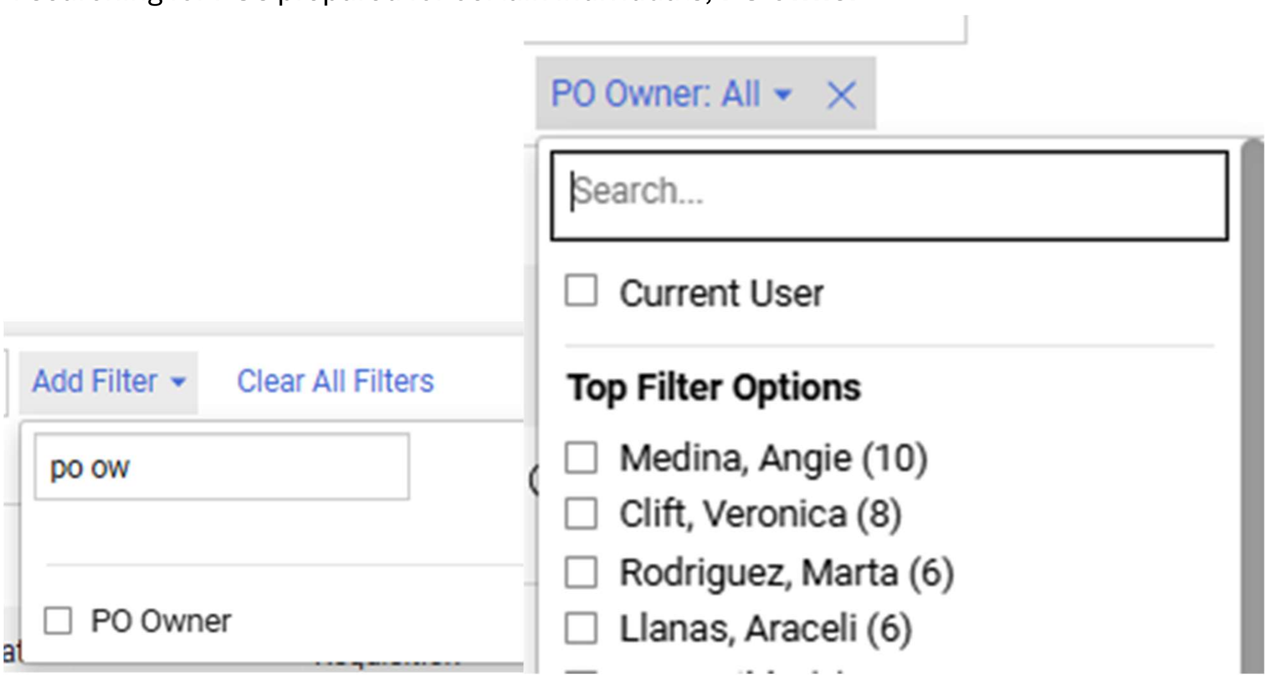
iii. **AP Status**



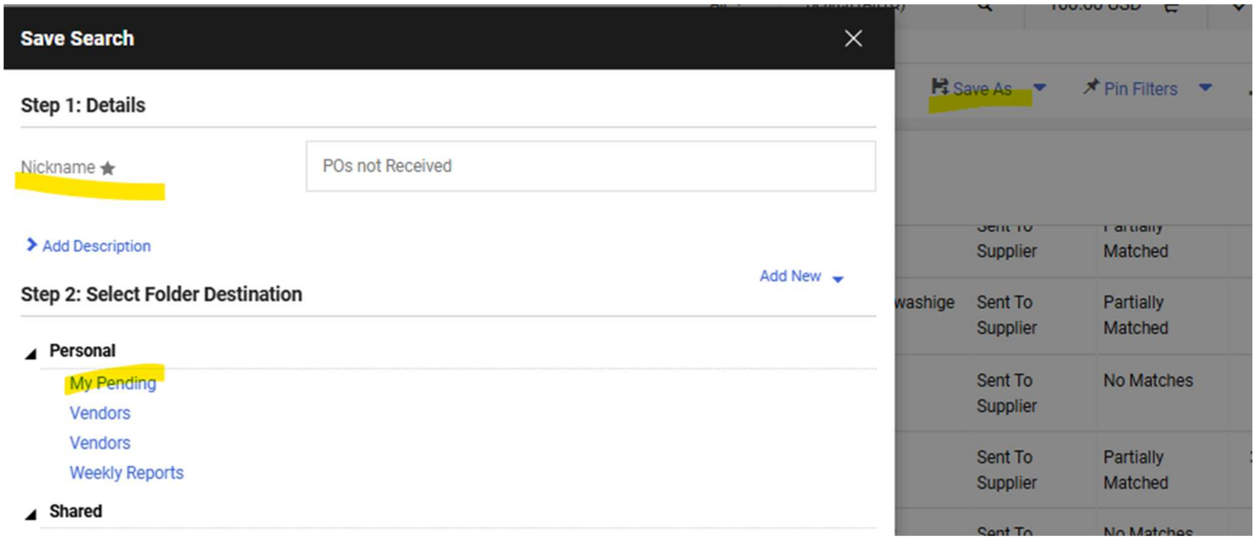
7. If searching for POs created by certain individuals, **Prepared By**

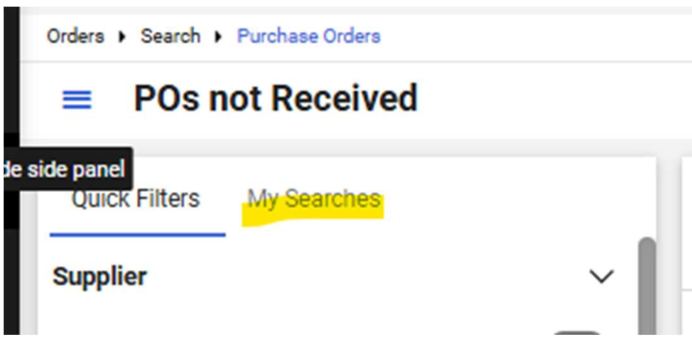


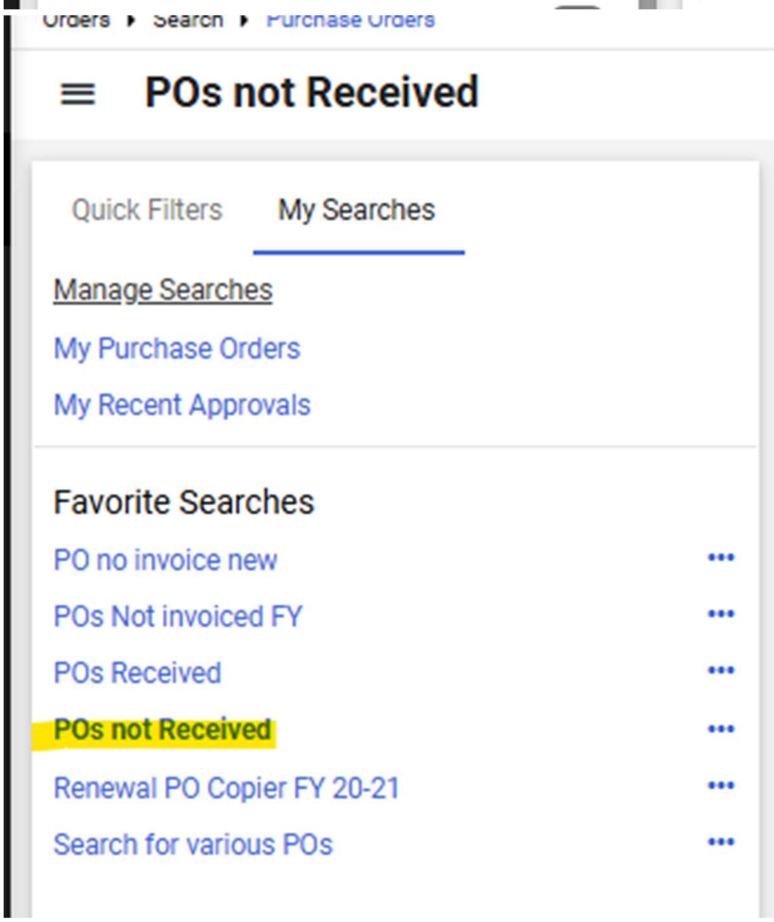
8. If searching for POs prepared for certain individuals, **PO owner**



9. Once the data has been filtered and the needed information is available, you can **Save As** the search, to have easy/quick access to the data in the future







10. To **Download** the data, click on **Export All**. You can add a **Title** to the data and click **Submit**.

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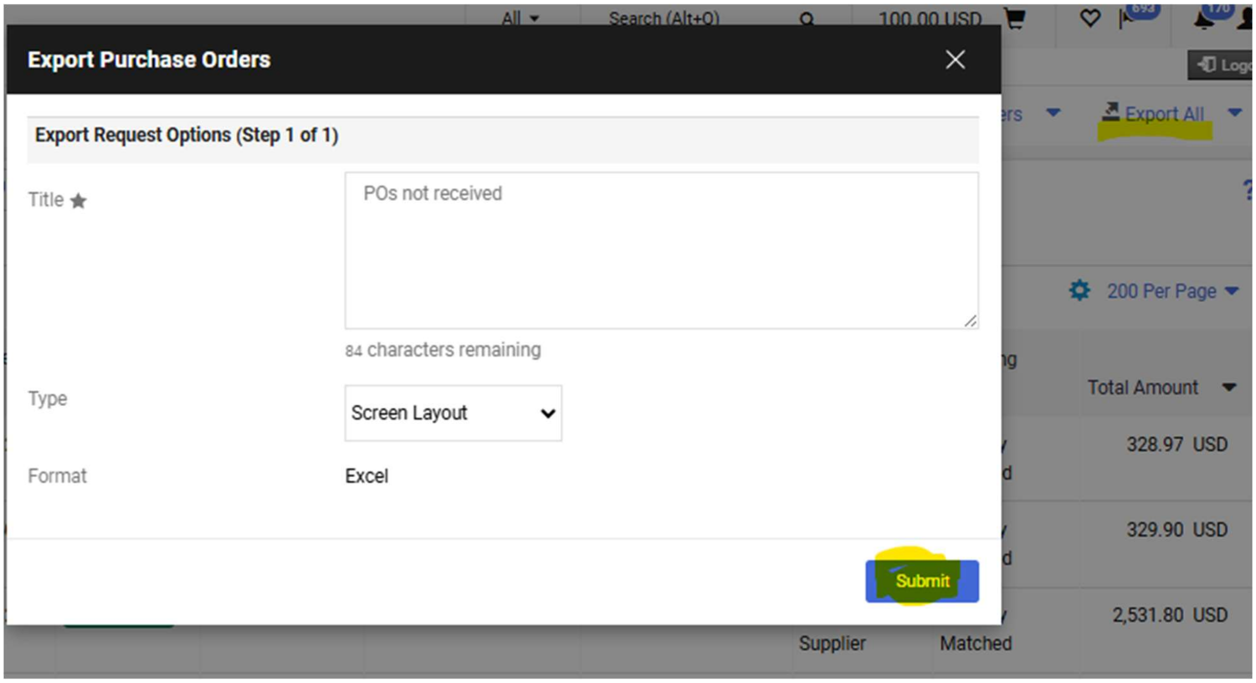

11. Go to **Manage Search Exports** and select the file to open in Excel