



Purchasing Reporting Manual

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Purchasing Queries

Purchase Orders

VTPO017 – Item Categories by Buyer	
Purpose	Lists all item categories and corresponding accounting information assigned to a buyer
Prompts	Set ID, primary buyer
Columns	Buyer, code, category, lead time days, account and account description

VTPOINFO – VT Cust Report of PO Spending	
Purpose	Lists all purchase orders and association contracts and transactions dates for a department within a specified range of amounts
Prompts	Business unit (use % for all), account (use % for all), fund (use % for all), PO start date, PO end date, start monetary range amount, end monetary range amount
Columns	PO ID, business unit, department name, PO date, item, item description, contract number, PO quantity, amount, account description and code, fund and fund name, vendor name and state

VTPOR003 – Recycled Items Purchased	
Purpose	Lists PO, quantity and price for a specific item purchased for a given business unit, date range, and recyclable status
Prompts	Business unit, item ID, item recycle flag, PO date range
Columns	Item and description, business unit and department name, PO number, PO date, vendor ID and name, PO line, PO quantity, unit of measure, price, recyclable status; also repeats the prompted values

VT_CONTRACT_USAGE_REPORT	
Purpose	Lists PO information for a contract used by a specified department during a specified time range
Prompts	Set ID, contract ID, PO date range, PO business unit
Columns	Contract ID, contract line, line description, PO date, PO unit, PO number, PO line, PO quantity, amount; also repeats prompted date range

VT_ENC_PO – Encumbrance to be Liquidated	
Purpose	Lists PO's that are not fully liquidated and not in a complete or cancelled status
Prompts	Business unit, PO date range
Columns	PO unit, PO ID, PO status, voucher ID; also repeats prompted date range

VT_MASTER_CONTRACT_VCHR_PO – Contract Activity by Vendor	
Purpose	Lists all contract vouchers and PO's for a vendor along with related contract information
Prompts	Vendor set ID, vendor ID, range of payment dates
Columns	GL business unit, origin, contract ID, master contract ID, vendor ID, contract description, contract beginning and expiration dates, contract maximum amount, maximum line amount, total amount released on contract, voucher ID, voucher line number, PO ID, PO distribution line number, voucher line amount, account and payment date

VT_PO_ACCOUNT_TYPE_NOT_E – PO's Without Expense Account	
Purpose	Lists all PO's and associated accounting information that has an account other than an expense account
Prompts	GL business unit, range of PO dates
Columns	GL business unit, PO business unit, PO ID, account and account name, fund and fund name, program, class, project/grant, amount and PO date

VT_PO_BUYER_ACTIVITY – Count & Amt Distrib Line	
Purpose	Lists all valid (not cancelled) PO's for a buyer within a certain PO business unit and date range
Prompts	Buyer, PO business unit, PO date range
Columns	Buyer, PO business unit, PO ID, PO date, PO line, PO description, requisition ID, requisition line, total distribution lines, PO total

VT_PO_DETAIL_BY_VENDOR – PO Detail by Vendor	
Purpose	Lists all valid (not cancelled) PO's for a vendor and associated contract information
Prompts	Set ID, vendor ID, PO business unit, PO date range
Columns	Vendor ID and name, PO business unit, PO ID, PO date, PO status, PO line number, item ID, PO description, category, PO quantity, unit of measure, price per unit, total amount, contract ID and contract line number

VT_PO_ITEM_ID_USAGE_REPORT	
Purpose	Lists valid (not cancelled) PO, business unit and associated contract ID for a given inventory item ID and PO date range.
Prompts	Item ID, PO business unit (use % for all), PO date range
Columns	Item description, PO business unit, PO ID, PO date, vendor ID and name, contract ID, PO line number, PO quantity, unit price, PO line amount

VT_PO_MATCH_REQUIRED – PO Match Required Status T	
Purpose	Lists PO's with a match status of "T" and associated voucher.
Prompts	PO business unit, PO date range
Columns	PO business unit, PO ID, PO status, PO date, match action, match status, PO ID, PO line number, template, type, PO amount voucher; also repeats prompted date range

VT_PO_RECV_REQUIRED – PO Receiving Required but Receipt Status is No	
Purpose	Lists PO's not received with a receiving required status
Prompts	PO business unit, PO date range
Columns	Business unit, PO number, PO status, received status, PO date, PO line number, receiving required status; also repeats prompted date range

VT_PO_STATUS_REPORT – Prompts for BU and range of dates	
Purpose	Lists the current status of all PO's within a business unit along with contract information.
Prompts	PO business unit (use % for all), PO date range, GL business unit
Columns	GL business unit, PO business unit, PO date, PO number, PO status, budget check status, PO line, PO description, line amount, contract number

VT_VENDOR_PO_XREF – PO's for a Vendor	
Purpose	Lists all PO's ever created for a particular vendor along with its current status
Prompts	Vendor ID
Columns	PO business unit, PO number, PO date, vendor set ID, vendor number, PO status

VT_RFQ_RESPONSE – Ranking RFQ Responses	
Purpose	Lists vendors that responded to RFQ's along with associated pricing terms
Prompts	PO business unit, RFQ ID
Columns	PO business unit, RFQ ID, vendor ID, vendor name, vendor location, date and time responded, payment terms, item ID, item description, vendor item ID, vendor catalog, unit of measure, quantity, unit price, minimum quantity, schedule date, days to deliver, comments

VT_PO8001– VT PO Budgetary Activity	
Purpose	Provides the output for the VT PO Budgetary Activity report that is initiated by running a process in the Purchasing module. See page 96 of the Purchasing 102 manual for instructions on running the initial process http://finance.vermont.gov/sites/finance/files/pdf/training_manuals/Purchase%20Orders%20Manual%20102.pdf
Prompts	Process instance
Columns	Process instance, PO business unit, GL business unit, PO status, line number, schedule number, distribution line number, dept ID, class, project/grant, fund, account, budget date from, budget date to, program, contract ID, vendor, vendor name, original PO amount, liquidated amount, vouchered amount, remaining amount, PO reference, PO line description, buyer

Requisitions

VT_REQ_ACCOUNT_TYPE_NOT_E – Req's Without Expense Account	
Purpose	Lists all Req's and associated accounting information that has an account other than an expense account
Prompts	GL business unit, range of requisition accounting date
Columns	GL business unit, PO business unit, req. ID, account and description, chartfield information, amount, accounting date

VT_REQ_STATUS_REPORT	
Purpose	Lists all requisitions for a PO business unit within a stated date range and their current statuses
Prompts	PO business unit, range of requisition accounting date
Columns	PO business unit, req. date, req. ID, origin, status, budget status, post status, req. line number, req. description, amount

VTPO006 – Quote Groups for a vendor	
Purpose	Lists the RFQ groups for the specified vendor
Prompts	Set ID, vendor ID
Columns	Vendor ID and name, location, group ID and description

VTPO006B – Quote groups listed by vendor	
Purpose	This query can be used two ways; 1) to list all vendors with a particular quote group, or 2) list all quote groups for a particular vendor. In either case the address description must be the ordering address (it must contain the word "order").
Prompts	Set ID (type "STATE"), vendor ID (use % for all), quote group ID (use % for all)
Columns	Vendor ID and name, location, quote group ID and description, address, phone, contact, email, address description

VT_PO_CP1_REQ_APPROVED – BU Created Requisition with Central Purchasing Origin	
Purpose	Lists all approved requisitions and corresponding business unit with a "CP" origin and a valid budget check status
Prompts	Range of accounting dates
Columns	PO business unit, req. ID, date, status (always "A"), origin (always "CP")

VT_PO_CP_REQ_APPROVED - Central Purchasing Approved Requisitions	
Purpose	Lists all approved requisitions and corresponding business that does not have a "CP" origin but does have a valid budget check status
Prompts	None
Columns	PO business unit, req. ID, date status (always "A"), origin

VT_VENDOR_RFQ – Vendor RFQ Report	
Purpose	Lists RFQ information for a range of RFQ opening dates
Prompts	Set ID, vendor ID (use % for all), range of opening dates, business unit (use % for all)
Columns	Business unit, vendor ID and name, vendor location, RFQ ID and reference, date and time RFQ is opened, date and time RFQ is closed, date and time responded, vendor responded (Y or N), quantity, req. line

VT_PO8002– VT Req Budgetary Activity	
Purpose	Provides the output for the VT Req Budgetary Activity report that is initiated by running a process in the Purchasing module. See page 81 of the Requisitions manual for instructions on running the initial process
Prompts	Process instance
Columns	Process instance, PO business unit, GL business unit, requisition ID, requisition status, line number, schedule number, distribution line number, dept ID, class, project/grant, fund, account, budget date from, budget date to, program, vendor ID, original requisition amount, liquidated amount, PO amount, remaining amount, requestor

Purchasing Reports

Expediting Report by Buyer (POY4006)

Introduction

Purpose of the Report

The report provides PO details such as late days and due date sorted by buyer. PO details include due date, late days, vendor ID/name and ship to ID. The run control page allows the user to specify a date range, vendor Set ID, vendor ID, and buyer.

Three reports can be produced from the same run control page: Expediting Report by Buyer (POY4006), Expediting Report by Vendor (POY4007), and Expediting Report by Due Date (POY4008).

This report is used to determine which POs may require expediting.

Type of Report

Crystal

Navigation Path to the Report

Purchasing > Purchase Orders > Reports > Expediting

Report Request Parameters

General Notes:

- Select an existing Run Control ID or enter a new one
- For reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. RUN_POY4005)
- An asterisk * preceding the field name indicates input is required

Report Request Parameters		see screenshots below
In This Field	Enter	Notes
From Date:	type date or use the lookup to select	<ul style="list-style-type: none"> to display one day - enter same date in both fields to display a date range – enter beginning and end date to display year to date – enter 07/01/YYYY and current date
Through Date:	type date or use the lookup to select	
Vendor Set ID	type STATE or use the lookup to select	Use STATE for most purchasing reports
Vendor ID:	type vendor ID or use the lookup to select	Leave blank to display all vendor IDs for selected report parameters Specify vendor ID to display data for one vendor ID
Buyer	type buyer or use the lookup to select	Leave blank to display all buyers for selected report parameters Specify buyer to display data for one buyer
	push the save button to save report parameters	save reports that you want to run on a regular basis
	push the run control button	on the Process Scheduler Request page
Server Name	Select "PSNTCR"	This is the server for Crystal Reports
Process List	Expediting Report by Buyer POY4006-	To select the proper report
	Click the "Ok" Button	This runs the report and returns you to the Report Request Parameters Page
Process Monitor	click the Process Monitor link	<ul style="list-style-type: none"> to view the processing status of the report click the refresh button until the Run Status is "Success" and the Distribution Status is "Posted"
Details	Click the Details link	Opens the Process Detail page
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page
POY4006- #####.PDF	Click the link for the PDF file	This opens the report

Report Request Parameters page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdevweb.finan.state.vt.us(bsp/FMDEV)/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL?Pol

PeopleSoft. Home | Worklist | Sign out

New Window | Help | Customize Page

Expediting Report

Run Control ID: RUN_POY4005 Report Manager Process Monitor Run

Language: English

Report Request Parameters

From Date: 07/01/2004 Through Date: 06/30/2005

Vendor SetID: STATE

Vendor ID: 000000217

Buyer:

Process Instance: 2490566

Process Scheduler Request page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdevweb.finan.state.vt.us(bsp/FMDEV)/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL?Pol

PeopleSoft. Home | Worklist | Sign out

New Window | Help | Customize Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: RUN_POY4005

Server Name: PSNTCR Run Date: 03/27/2006

Recurrence: Run Time: 11:43:16AM Reset to Current DateTime

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Expediting Report by Buyer	POY4006-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Vendor	POY4007-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Due Date	POY4008-	Crystal	Web	PDF	Distribution

OK Cancel

Process Instance: 2490566

Process Monitor Page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdevweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL?Pol

PeopleSoft.

Home | Worklist | Sign out

Process List **Server List**

View Process Request For

User ID: JHARRIS Type: Last: 20 Minutes Refresh

Serve: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490571		Crystal	POY4006-JHARRIS	JHARRIS	03/27/2006 11:43:16AM PST	Success	Posted	Details

Go back to Expediting Report

Process Instance: 2490571

Process Detail page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdevweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL?Pol

PeopleSoft.

Home | Worklist | Sign out

Process Detail

Process

Instance: 2490571 Type: Crystal

Name: POY4006 Description: Expediting Report by Buyer

Run Status: Success Distribution Status: Posted

Run Control ID: RUN_POY4005

Location: Server

Server: PSNTR

Recurrence:

Update Process

Hold Request

Queue Request

Cancel Request

Delete Request

Restart Request

Date/Time

Request Created On: 03/27/2006 11:51:50AM PST

Run Anytime After: 03/27/2006 11:43:16AM PST

Began Process At: 03/27/2006 11:52:18AM PST

Ended Process At: 03/27/2006 11:52:25AM PST

Actions

[Parameters](#) [Transfer](#)

[Message Log](#)

[Batch Timings](#)

[View Log/Trace](#)

Process Instance: 2490571

Expediting Report by Due Date (POY4008)

Introduction

Purpose of the Report

The report Provides PO details such as late days and due date sorted by due date. PO details include due date, late days, vendor ID/name and ship to ID. The run control page allows the user to specify a date range, vendor Set ID, vendor ID and buyer.

Three reports can be produced from the same run control page: Expediting Report by Buyer (POY4006), Expediting Report by Vendor (POY4007), and Expediting Report by Due Date (POY4008).

This report is used to determine which POs may require expediting.

Type of Report

Crystal

Navigation Path to the Report

Purchasing > Purchase Orders > Reports > Expediting Report

Report Request Parameters

General Notes:

- Select an existing Run Control ID or enter a new one
- For reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. RUN_POY4005)
- An asterisk * preceding the field name indicates input is required

Report Request Parameters		see screenshots below
In This Field	Enter	Notes
From Date:	type date or use the lookup to select	<ul style="list-style-type: none"> to display one day - enter same date in both fields to display a date range – enter beginning and end date to display year to date – enter 07/01/YYYY and current date
Through Date:	type date or use the lookup to select	
Vendor Set ID	type STATE or use the lookup to select	Use STATE for most purchasing reports
Vendor ID:	type vendor ID or use the lookup to select	leave blank to display all vendor IDs for selected report parameters specify vendor ID to display data for one vendor ID
Buyer	type buyer or use the lookup to select	leave blank to display all buyers for selected report parameters specify buyer to display data for one buyer
	push the save button to save report parameters	save reports that you want to run on a regular basis
	push the run control button	on the Process Scheduler Request page
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
	Click the “Ok”	This runs the report and returns you to the Report Request Parameters page
Process Monitor	click the Process Monitor link	<ul style="list-style-type: none"> view the processing status of the report click the refresh button until the Run Status is “Success” and the Distribution Status is “Posted”
Details	Click the Details link	Opens the Process Detail page
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page
POY4008- #####.PDF	Click the link for the PDF file	This opens the report

Report Request Parameters page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdeweb.firman.state.vt.us/psp/fmdev/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL

PeopleSoft

Home | Worklist | Sign Out

New Window | Help | Customize Page

Expediting Report

Run Control ID: RUN_POY4005 Report Manager Process Monitor Run

Language: English

Report Request Parameters

From Date: 04/01/2005 Through Date: 06/30/2005

Vendor SetID: STATE

Vendor ID: 0000042900

Buyer:

Process Instance: 2490620

Process Scheduler Request Page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdeweb.firman.state.vt.us/psp/fmdev/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL

PeopleSoft

Home | Worklist | Sign Out

New Window | Help | Customize Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: RUN_POY4005

Server Name: PSNTCR Run Date: 03/27/2006

Recurrence: Run Time: 2:18:50PM Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Expediting Report by Buyer	POY4006-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Vendor	POY4007-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Expediting Report by Due Date	POY4008-	Crystal	Web	PDF	Distribution

OK Cancel

Process Instance: 2490620

Process Monitor Page

The screenshot shows the 'Process Monitor' page in a PeopleSoft application. The browser window title is 'Expediting Report - Microsoft Internet Explorer'. The address bar shows the URL: http://fmdvweb.finman.state.vt.us/jsp/FMDEV/EMPLOYEE/ERP/c/PMANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL. The page header includes the PeopleSoft logo and navigation links for 'Home', 'Worklist', and 'Sign out'.

The main content area is titled 'Process List' and includes a 'Server List' tab. Below the tabs is a search and filter section with the following fields:

- User ID: JHARRIS
- Type: [Dropdown]
- Last: 1 Hours
- Refresh button
- Server: [Dropdown]
- Name: [Text]
- Instance: [Text] to [Text]
- Run Status: [Dropdown]
- Distribution Status: [Dropdown]
- Save On Refresh checkbox (checked)

The 'Process List' table displays the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490620		Crystal	POY4008-JHARRIS	JHARRIS	03/27/2006 2:15:34PM PST	Success	Posted	Details
<input type="checkbox"/>	2490618		Crystal	POY4008-JHARRIS	JHARRIS	03/27/2006 2:14:22PM PST	Success	Posted	Details
<input type="checkbox"/>	2490594		Crystal	POY4007-JHARRIS	JHARRIS	03/27/2006 1:44:25PM PST	Success	Posted	Details
<input type="checkbox"/>	2490593		Crystal	POY4007-JHARRIS	JHARRIS	03/27/2006 1:39:14PM PST	Success	Posted	Details
<input type="checkbox"/>	2490589		Crystal	POY4008-JHARRIS	JHARRIS	03/27/2006 1:33:53PM PST	Success	Posted	Details
<input type="checkbox"/>	2490585		Crystal	POY4007-JHARRIS	JHARRIS	03/27/2006 1:29:13PM PST	Success	Posted	Details

The status bar at the bottom indicates 'Process Instance: 2490620'.

Process Detail Page

The screenshot shows the 'Process Detail' page in a PeopleSoft application. The browser window title is 'Expediting Report - Microsoft Internet Explorer'. The address bar shows the URL: http://fmdvweb.finman.state.vt.us/jsp/FMDEV/EMPLOYEE/ERP/c/PMANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL. The page header includes the PeopleSoft logo and navigation links for 'Home', 'Worklist', and 'Sign out'.

The main content area is titled 'Process Detail' and displays the following information:

- Instance: 2490620
- Type: Crystal
- Name: POY4008
- Description: Expediting Report by Due Date
- Run Status: Success
- Distribution Status: Posted

Below this information is a 'Run' section with an 'Update Process' button and several radio button options:

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

The 'Run Control ID' is RUN_POY4005. Other details include Location: Server, Server: PSNTCR, and Recurrence: [Blank].

The 'Date/Time' section shows the following timeline:

- Request Created On: 03/27/2006 2:15:39PM PST
- Run Anytime After: 03/27/2006 2:15:34PM PST
- Began Process At: 03/27/2006 2:16:07PM PST
- Ended Process At: 03/27/2006 2:16:16PM PST

The 'Actions' section includes links for Parameters, Transfer, Message Log, Batch Timings, and View Log/Trace.

The status bar at the bottom indicates 'Process Instance: 2490620'.

Expediting Report by Vendor (POY4007)

Introduction

Purpose of the Report

The report provides PO details such as late days and due date sorted by vendor. PO details include due date, late days, vendor ID/name and ship to ID. The run control page allows the user to specify a date range, vendor Set ID, vendor ID and buyer

Three reports can be produced from the same run control page: Expediting Report by Buyer (POY4006), Expediting Report by Vendor (POY4007), and Expediting Report by Due Date (POY4008).

This report is used to determine which POs may require expediting.

Type of Report

Crystal

Navigation Path to the Report

Purchasing > Purchase Orders > Reports > Expediting

Report Request Parameters

General Notes:

- Select an existing Run Control ID or enter a new one
- For reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. RUN_POY4005)
- An asterisk * preceding the field name indicates input is required

Report Request Parameters		see screenshots below
In This Field	Enter	Notes
From Date:	type date or use the lookup to select	<ul style="list-style-type: none"> to display one day - enter same date in both fields to display a date range – enter beginning and end date to display year to date – enter 07/01/YYYY and current date
Through Date:	type date or use the lookup to select	
Vendor Set ID	Type STATE or use the lookup to select	Use STATE for most purchasing reports
Vendor ID:	type vendor ID or use the lookup to select	leave blank to display all vendor IDs for selected report parameters specify vendor ID to display data for one vendor ID
Buyer	type buyer or use the lookup to select	leave blank to display all buyers for selected report parameters specify buyer to display data for one buyer
	Click the save button to save report parameters	save reports that you want to run on a regular basis
	push the run control button	on the Process Scheduler Request page
Server Name	Select "PSNTPCR"	This is the server for Crystal Reports
Process List	Expediting Report by Vendor POY4007-	To select the proper report
	Click the "Ok" Button	This runs the report and returns you to the Report Request Parameters page
Process Monitor	click the Process Monitor link	<ul style="list-style-type: none"> view the processing status of the report click the refresh button until the Run Status is "Success" and the Distribution Status is "Posted"
Details	Click the Details link	Opens the Process Detail page
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page
POY4007- #####.PDF	Click the link for the PDF file	This opens the report

Report Request Parameters page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdvweb.firman.state.vt.us/psp/fmdev/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL

PeopleSoft. Home Worklist Sign Out

New Window Help Customize Page

Expediting Report

Run Control ID: RUN_POY4005 Report Manager Process Monitor Run

Language: English

Report Request Parameters

From Date: 05/01/2005 Through Date: 05/31/2005

Vendor SetID: STATE

Vendor ID:

Buyer:

Process Instance: 2490593

Process Scheduler Request page

Expediting Report - Microsoft Internet Explorer

Address: http://fmdvweb.firman.state.vt.us/psp/fmdev/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4005.GBL

PeopleSoft. Home Worklist Sign Out

New Window Help Customize Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: RUN_POY4005

Server Name: PSNTCR Run Date: 03/27/2006

Recurrence: Run Time: 1:44:25PM Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Expediting Report by Buyer	POY4006-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Expediting Report by Vendor	POY4007-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Due Date	POY4008-	Crystal	Web	PDF	Distribution

OK Cancel

Process Instance: 2490593

Process Monitor Page

The screenshot shows the 'Process List' page in PeopleSoft. At the top, there is a search filter for 'View Process Request For' with fields for User ID (JHARRIS), Type, Last (1 Hours), Server, Name, Instance, Run Status, and Distribution Status. A 'Refresh' button is present. Below the filter is a table of process instances:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490594		Crystal	POY4007-JHARRIS	JHARRIS	03/27/2006 1:44:25PM PST	Success	Posted	Details
<input type="checkbox"/>	2490593		Crystal	POY4007-JHARRIS	JHARRIS	03/27/2006 1:39:14PM PST	Success	Posted	Details
<input type="checkbox"/>	2490589		Crystal	POY4006-JHARRIS	JHARRIS	03/27/2006 1:33:53PM PST	Success	Posted	Details
<input type="checkbox"/>	2490585		Crystal	POY4007-JHARRIS	JHARRIS	03/27/2006 1:29:13PM PST	Success	Posted	Details

At the bottom of the browser window, the address bar shows 'Process Instance:2490594'.

Process Detail page

The screenshot shows the 'Process Detail' page in PeopleSoft. It displays the following information for process instance 2490594:

- Instance:** 2490594
- Type:** Crystal
- Name:** POY4007-
- Description:** Expediting Report by Vendor
- Run Status:** Success
- Distribution Status:** Posted

Below this information is an 'Update Process' section with several radio button options:

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

At the bottom, there is a 'Date/Time' section with the following data:

- Request Created On:** 03/27/2006 1:45:27PM PST
- Run Anytime After:** 03/27/2006 1:44:25PM PST
- Began Process At:** 03/27/2006 1:45:51PM PST
- Ended Process At:** 03/27/2006 1:46:20PM PST

Next to these dates are links for 'Parameters Transfer', 'Message Log', 'Batch Timings', and 'View Log/Tracs'. The browser address bar at the bottom shows 'Process Instance:2490594'.

Item Categories by Buyer (VTPO017)

Report Information

Purpose of the Report

This report lists all of the item categories by primary buyer along with the lead time days and account information.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > VT Item Categories by Buyer

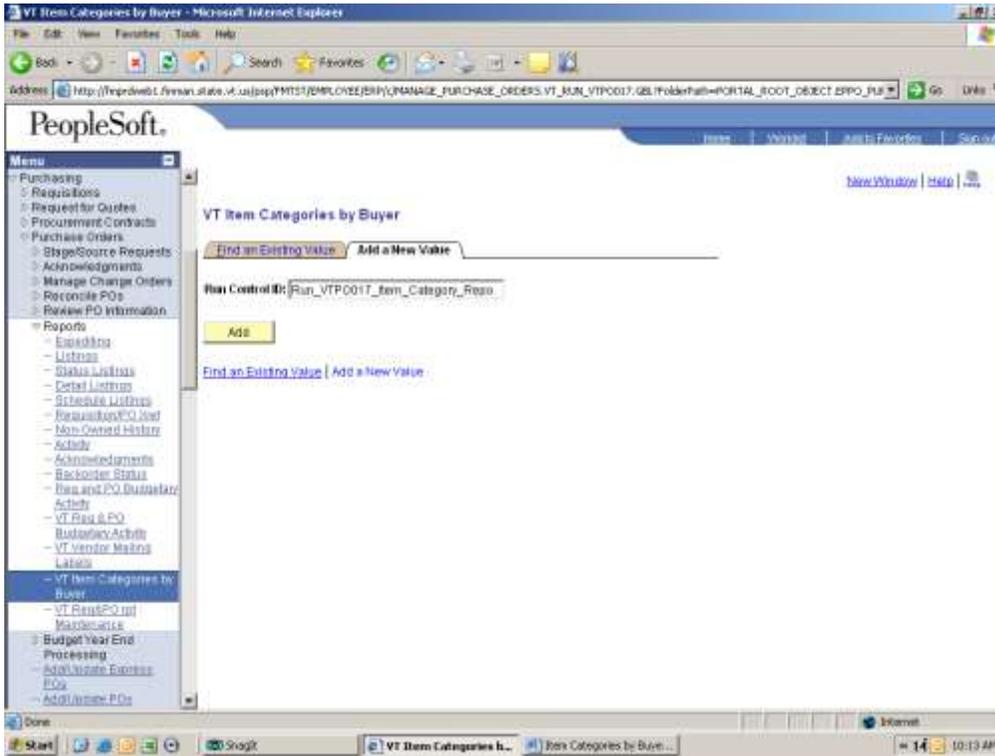
Report Execution Procedure

Run Control Notes:

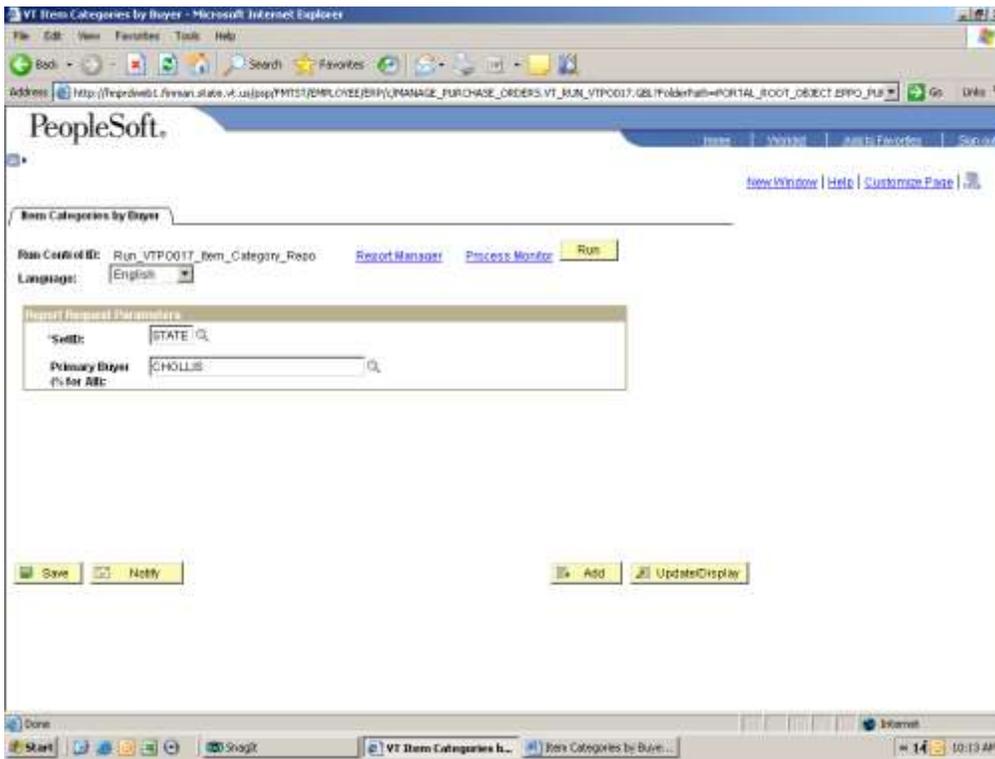
- Select an existing Run Control ID or add a new one.
- For Reports that are run regularly, user should select a Run Control ID name that can be easily identified (e.g. Run_VTPO017_Item_Category_Repo).

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
SetID	Enter the SetID or use the lookup to select.	A selection in this field is required
Primary Buyer	Enter the User ID	Click on magnifying glass to lookup value; enter % to select all
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> • To view the processing status of the report. • Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
VTPO017-#####.PDF	Click this link for the PDF file	This opens the report.

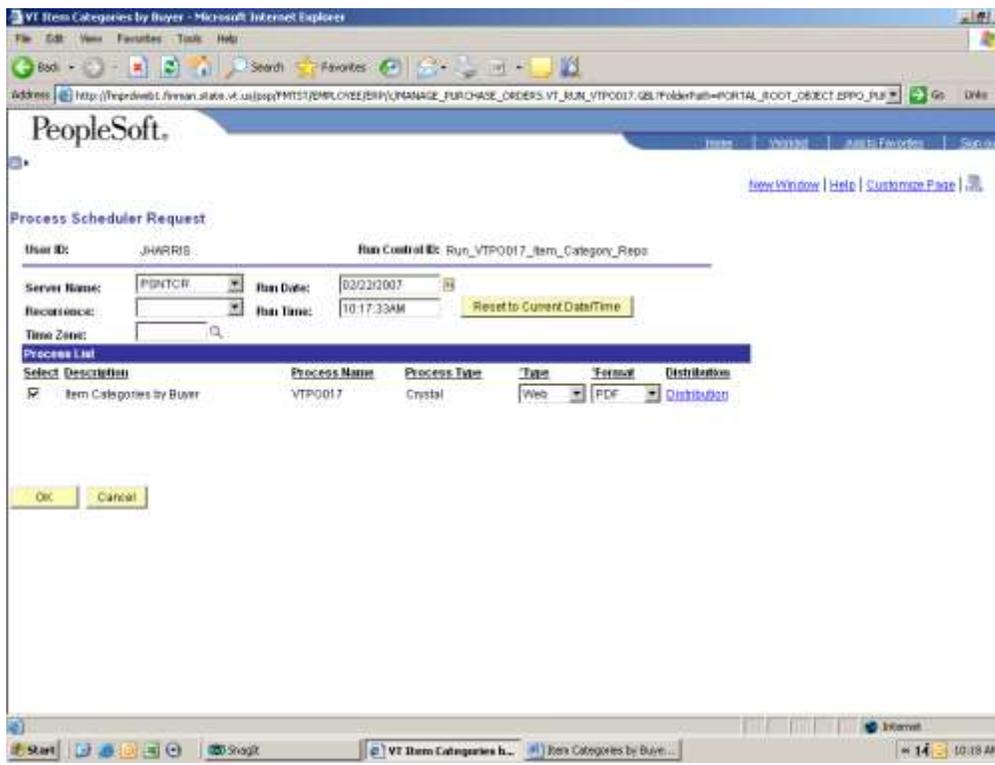
Run Control ID Page



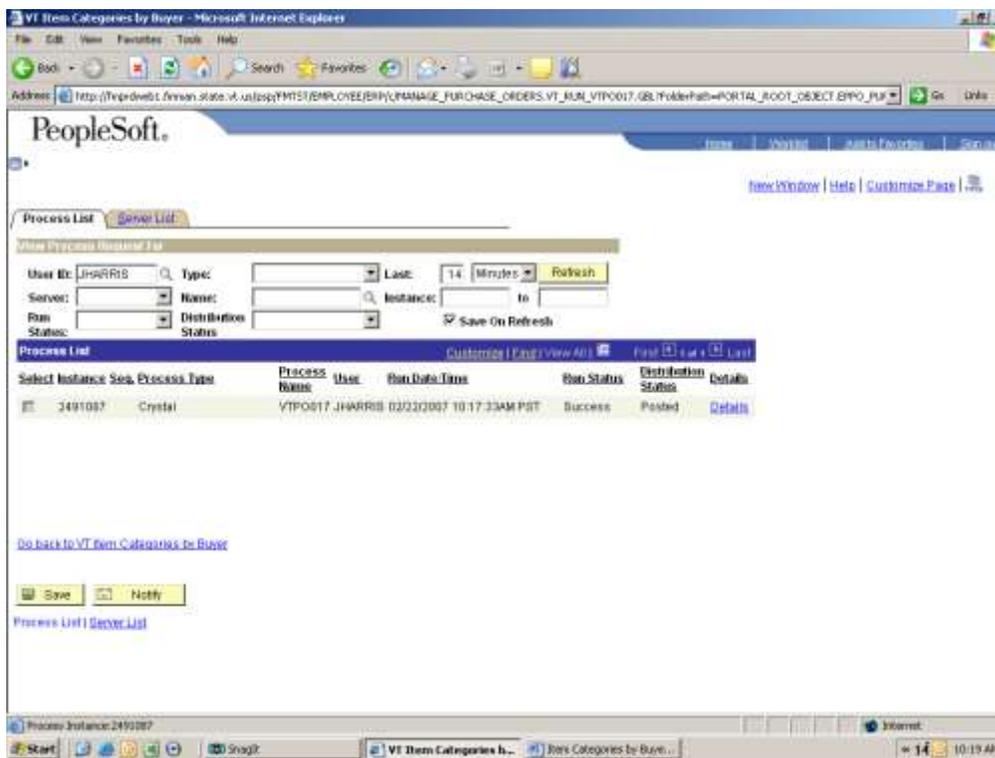
Report Request Parameters Page



Process Scheduler Request Page



Process Monitor Page



Process Detail Page

The screenshot shows the 'Process Detail' page for a process named 'VTPO017'. The browser address bar shows the URL: http://fpeprodweb1.finnan.state.vt.us/jsp/MTST/EMPLOYEE/HRH/UNMANAGE_PURCHASE_ORDERS_VT_RUN_VTPO017.GBL?FolderPath=PORTAL_ROOT_OBJECT/EPPO_PUR.

Process Detail

Instance: 2491087 Type: Crystal
 Name: VTPO017 Description: Item Categories by Buyer
 Run Status: Success Distribution Status: Posted

Run **Update Processes**

Run Control ID: Run_VTPO017_Item_Categor_Rep Hold Request
 Location: Server Create Request
 Server: PSNTDR Cancel Request
 Recurrence: Delete Request
 Restart Request

Info/Time **Actions**

Request Created On: 02/22/2007 10:18:29AM PST [Parameters](#) Transfer
 Run Anytime After: 02/22/2007 10:17:33AM PST [Message Log](#)
 Began Process At: 02/22/2007 10:18:53AM PST [Batch Timings](#)
 Ended Process At: 02/22/2007 10:19:08AM PST [View Log/Trace](#)

Buttons: OK, Cancel

View Log/Trace Page

The screenshot shows the 'View Log/Trace' page for process instance 2491087. The browser address bar shows the URL: http://fpeprodweb1.finnan.state.vt.us/jsp/MTST/EMPLOYEE/HRH/UNMANAGE_PURCHASE_ORDERS_VT_RUN_VTPO017.GBL?FolderPath=PORTAL_ROOT_OBJECT/EPPO_PUR.

View Log/Trace

Report ID: 4587 Process Instance: 2491087 [Message Log](#)
 Name: VTPO017 Process Type: Crystal
 Run Status: Success

Item Categories by Buyer

Distribution Details

Distribution Mode: FDMWEBCR Expiration Date: 1/1/2008

File List

Name	File Size (bytes)	DateTime Created
Message Log	0	02/22/2007 10:19:08.000000AM PST
VTPO017_2491087.PDF	181,670	02/22/2007 10:19:08.000000AM PST
PeopleSoft Trace File	489	02/22/2007 10:19:08.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Buttons: Return

Example of Report Output


Item Categories by Buyer

Primary Buyer	Category ID	Category Description	Lead Time	Account	Account Description
CHOLLIS					
	30525	DISTANCE MEASURING EQUIPMENT	30	522400	Other Equipment
	30528	DRAFTING INSTRUMENTS & SUPPLIE	30	520000	Office Supplies
	30542	ENGINEERS FIELD BOOKS	30	520000	Office Supplies
	30560	MEASURING EQUIPMENT CHAINS, M	30	520000	Office Supplies
	30578	SURVEYING INSTRUMENTS & SYSTEM	30	520000	Office Supplies
	30599	ENGINEERING EQUIP. NOT OTHERWI	30	520000	Office Supplies
	32070	FLAGS, STATE & U.S. INDOOR & O	30	520500	Other General Supplies
	51507	LEAF BLOWERS	30	522400	Other Equipment
	51508	SNOW BLOWERS	30	522400	Other Equipment
	51510	LAWN EDGERS & GRASS TRIMMERS	30	522400	Other Equipment
	51530	LAWN MOWERS, RIDING	30	522400	Other Equipment
	51540	LAWN MOWER, FRONT MOUNT, RIDI	30	522400	Other Equipment
	51550	LAWN MAINT. EQUIP & ACCESS.	30	522400	Other Equipment
	51581	TREE CUTTING EQUIPMENT	30	522400	Other Equipment
	51599	LAWN & GROUNDS EQUIP. OTHER	30	522400	Other Equipment
	65515	CAMERA ACCESSORIES FLASHES, T	30	520560	Photo Supplies
	65523	CAMERA CARRYING CASES, GADGET	30	520560	Photo Supplies
	65525	CAMERAS, STILL, SELFDEVELOPING	30	520560	Photo Supplies
	65529	CAMERAS, STILL, 35MM, ETC	30	520560	Photo Supplies
	65547	FILM, PHOTOGRAPHIC, SELF-DEVEL	30	520560	Photo Supplies
	65578	PHOTO IDENTIFICATION SYSTEMS	30	520560	Photo Supplies

1 of 2

Open Purchase Order (POROL001)

Report Information

Purpose of the Report

Reviews open POs for the budget year-end process.

The information for the PO distribution lines appear in this report if their encumbrances still remain on the KK_LIQUIDATION table.

Type of Report

SQR

Navigation (Path) to the Report

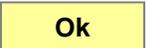
Purchasing > Purchase Orders > Budget Year End Processing > Open Purchase Order

Report Execution Procedure

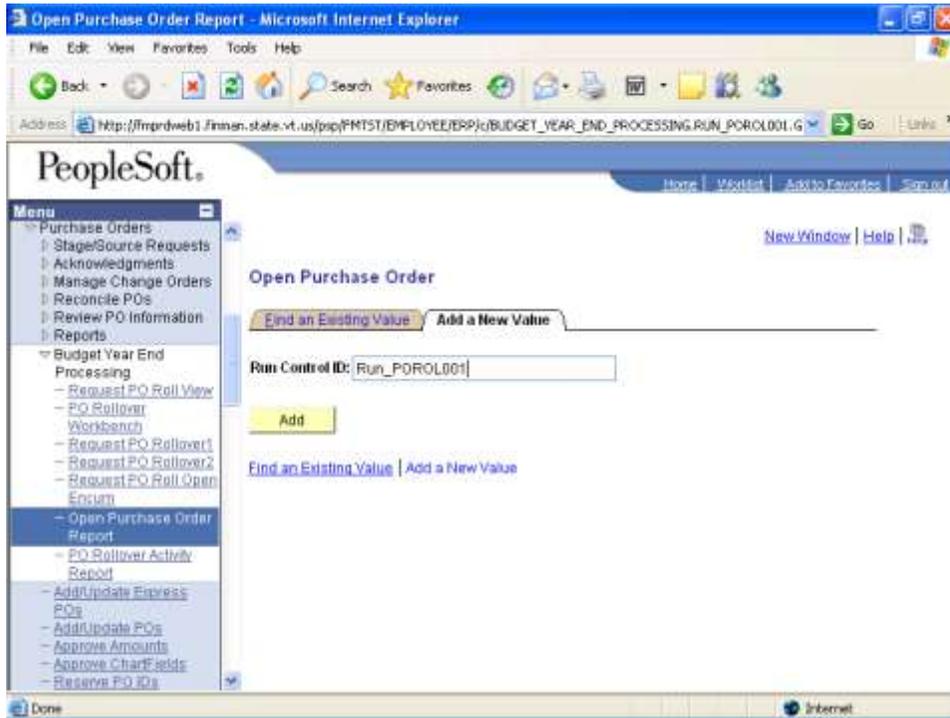
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POROL001)

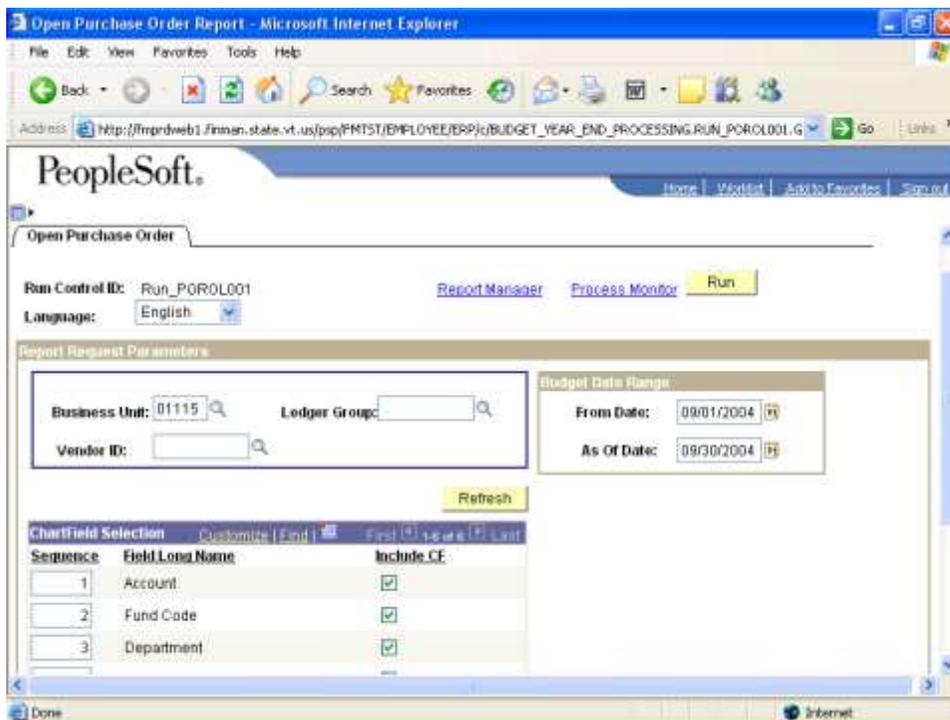
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
Ledger Group	Enter Ledger Group or use lookup to select.	Leave field blank to select all Ledger Groups.
Vendor ID	Enter Vendor ID or use lookup to select	Leave field blank to select all Vendor IDs.
From Date	Enter From date or use pop-up calendar to select	An entry in this field is required.
As of Date	Enter As of Date or use pop-up calendar to select	Leave field blank to include all dates up to the current day.

Report Steps		see screenshot below
In This Field/Link	Action	Notes
Chartfield Selection	Select the chartfields you want included.	You can also change the order each chartfield appears on the report.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSUNX”	This is the server for SQR Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POROL001-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POROL001

Server Name: PSUW Run Date: 03/30/2006

Recurrence: Run Time: 8:49:23AM [Reset to Current DateTime](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Open Purchase Order	POROL001	BQR Report	Web	PDF	Distribution

OK Cancel

Process Monitor Page

Process List [Server List](#)

View Process Request For

User ID: JHARRIS Type: Last: 30 Minutes [Refresh](#)

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2498648		BQR Report	POROL001	JHARRIS	03/30/2006 0:31:29AM PST	Success	Posted	Details

Process Detail Page

The screenshot shows the 'Process Detail' page in a Microsoft Internet Explorer browser. The browser's address bar displays the URL: http://fmrprdweb1.finnn.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/BUDGET_YEAR_END_PROCESSING.RUN_POROL001.G. The PeopleSoft logo is visible at the top left, and navigation links for Home, MyList, Add to Favorites, and Sign out are at the top right.

The main content area is titled 'Process Detail' and contains the following information:

Process	
Instance: 2488648	Type: SQR Report
Name: POROL001	Description: Open Purchase Order
Run Status: Success	Distribution Status: Posted

Below this information are two tabs: 'Run' and 'Update Process'. The 'Run' tab is active and shows:

Run Control ID: Run_POROL001	<input type="radio"/> Hold Request
Location: Server	<input type="radio"/> Queue Request
Server: PSUNX	<input type="radio"/> Cancel Request
Recurrence:	<input type="radio"/> Delete Request
	<input type="radio"/> Restart Request

The 'Update Process' tab is also visible. Below the tabs is a 'Data/Time' section with the following details:

Data/Time	Actions
Request Created On: 03/30/2006 8:31:38AM PST	Parameters Transfer
Run Anytime After: 03/30/2006 8:31:29AM PST	Message Log
Began Process At: 03/30/2006 8:31:46AM PST	Batch Timings
Ended Process At: 03/30/2006 8:41:31AM PST	View Log/Trace

View Log/Trace Page

This screenshot is identical to the one above, showing the 'Process Detail' page in the same browser window. The URL, PeopleSoft logo, and navigation links are the same. The 'Process Detail' section shows the same process information (Instance: 2488648, Name: POROL001, Run Status: Success, Distribution Status: Posted). The 'Run' tab is active, showing the same control options (Hold, Queue, Cancel, Delete, Restart Request). The 'Data/Time' section also shows the same timing information and available actions (Parameters, Message Log, Batch Timings, View Log/Trace).

Order Status by Item (POY4021)

Report Information

Purpose of the Report

This report provides PO status information sorted by item.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Status Listings

Report Execution Procedure

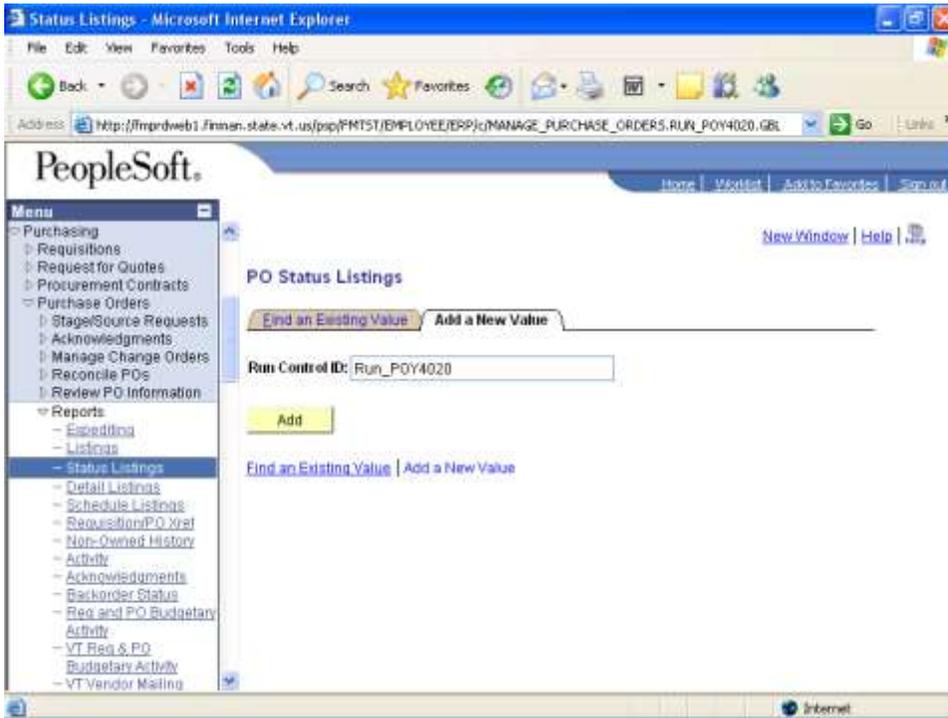
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4020)

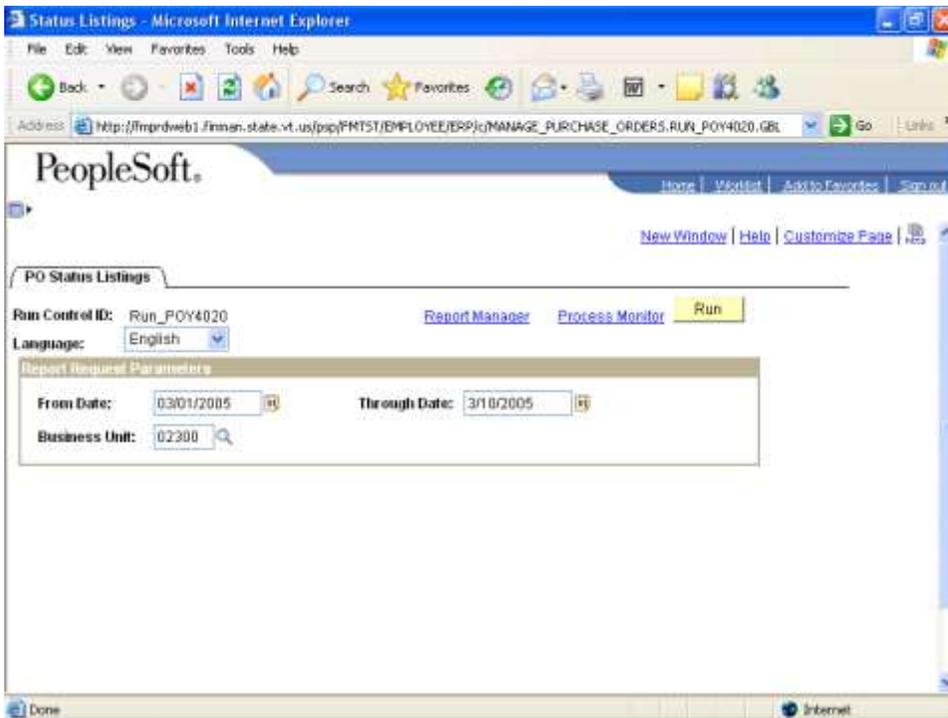
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or select from the pop-up calendar.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or select from the pop-up calendar.	
Business Unit	Enter the Business Unit or use the lookup to select.	Leave field blank to select all Business Units.

Report Steps		see screenshot below
Run	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Process List Select	Check “Order Status by Item”	To select the proper report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
Ok	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4021-#####.PDF	Click this link for the PDF file	This opens the report.

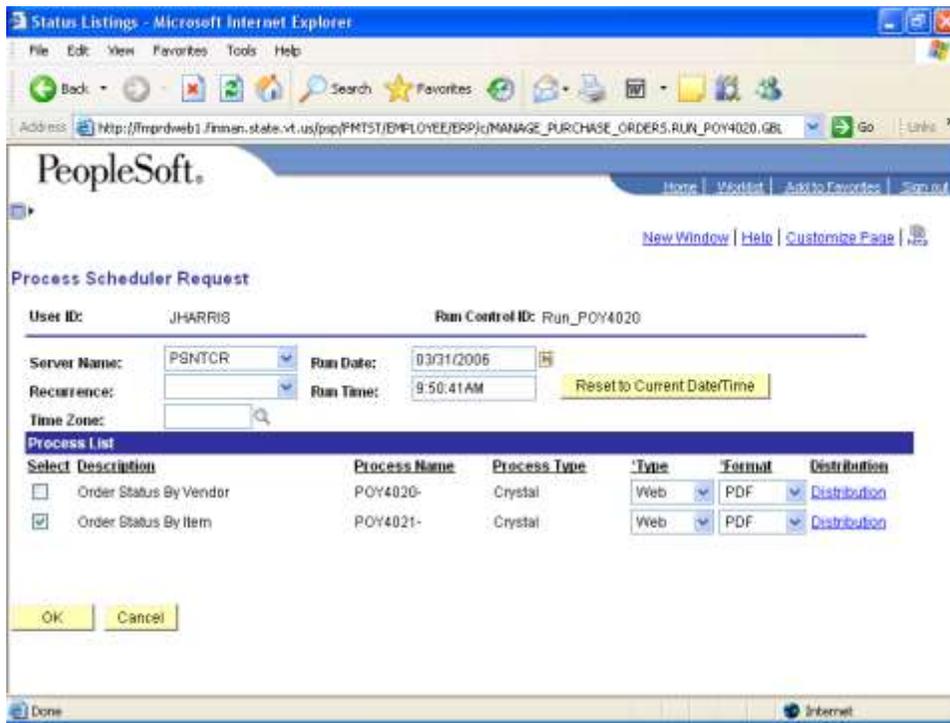
Run Control ID Page



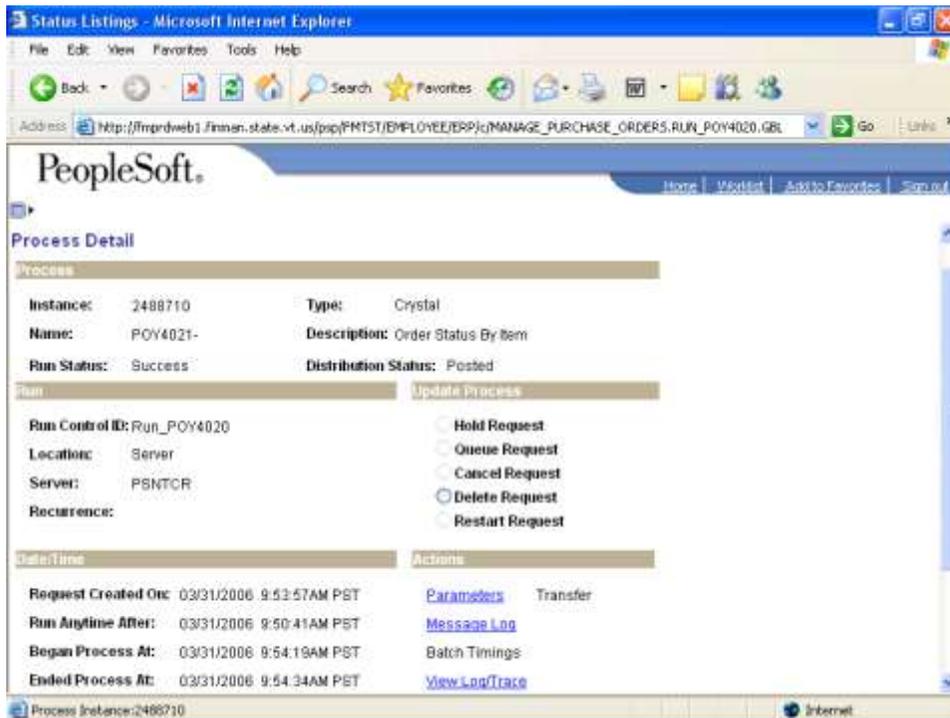
Report Request Parameters Page



Process Scheduler Request Page



Process Monitor Page



Process Detail Page

View Log/Trace

Report

Report ID: 2652 Process Instance: 2488710 [Message Log](#)

Name: POY4021- Process Type: Crystal

Run Status: Success

Order Status By Item

Distribution Details

Distribution Node: FDMWEBCR Expiration Date: 04/07/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/31/2006 9:54:34.000000AM PST
POY4021-2488710.PDF	51,327	03/31/2006 9:54:34.000000AM PST
PeopleSoft Trace File	471	03/31/2006 9:54:34.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488710

View Log/Trace Page

View Log/Trace

Report

Report ID: 2652 Process Instance: 2488710 [Message Log](#)

Name: POY4021- Process Type: Crystal

Run Status: Success

Order Status By Item

Distribution Details

Distribution Node: FDMWEBCR Expiration Date: 04/07/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/31/2006 9:54:34.000000AM PST
POY4021-2488710.PDF	51,327	03/31/2006 9:54:34.000000AM PST
PeopleSoft Trace File	471	03/31/2006 9:54:34.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488710

Order Status By Vendor (POY4020)

Report Information

Purpose of the Report

This report provides PO status information sorted by vendor.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Status Listings

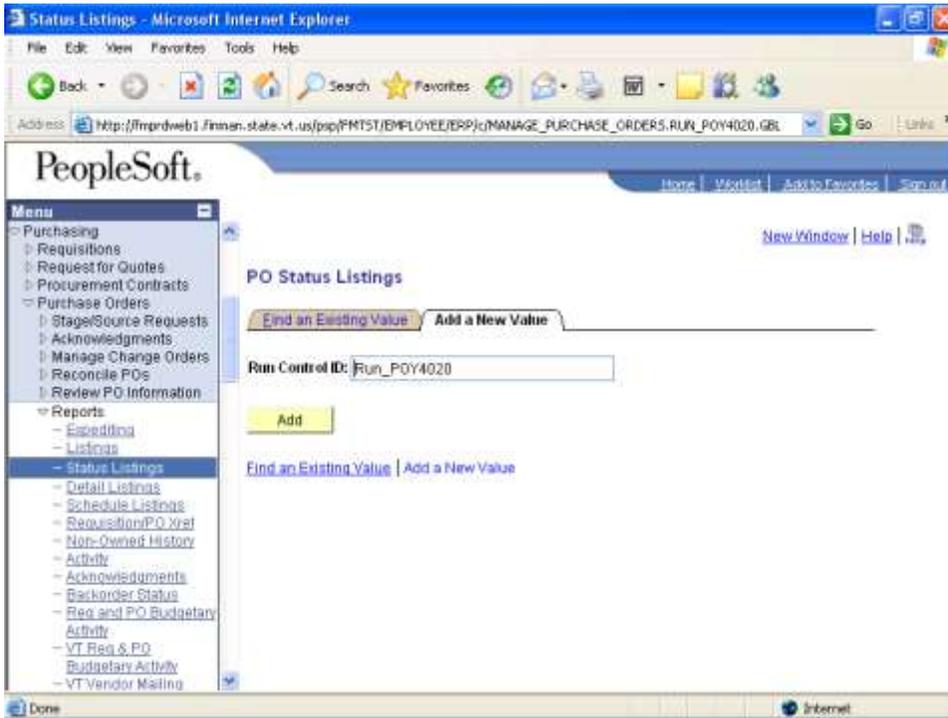
Report Execution Procedure

Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4020)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or use pop-up calendar to select.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through date or use pop-up calendar to select.	
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Unit.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Process List Select	Choose “Order Status by Vendor”	To select the proper report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> • To view the processing status of the report. • Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4020-#####.PDF	Click this link for the PDF file	This opens the report.

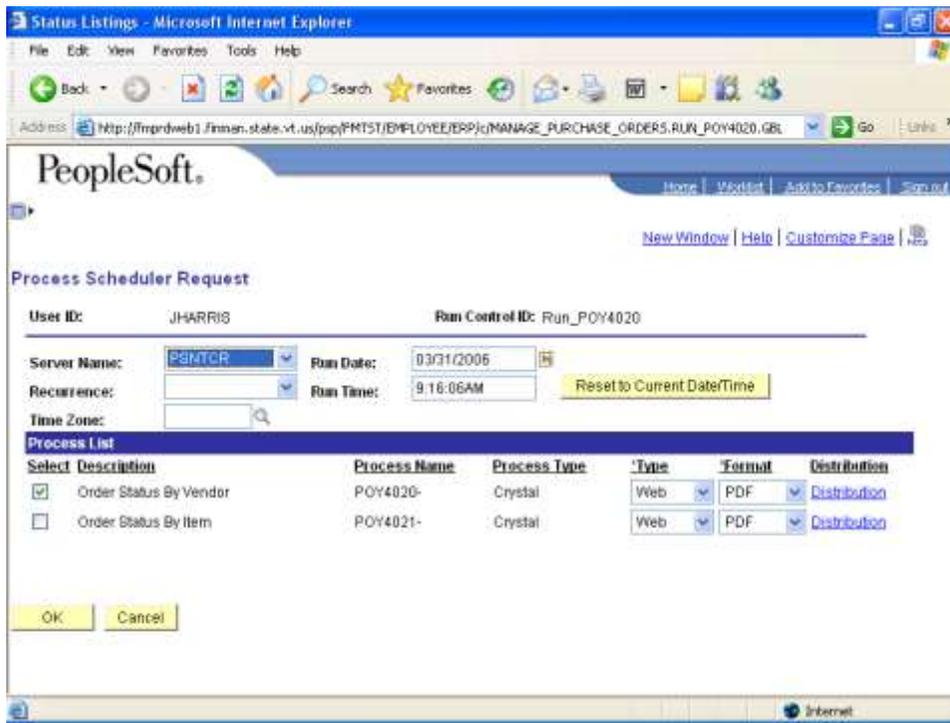
Run Control ID Page



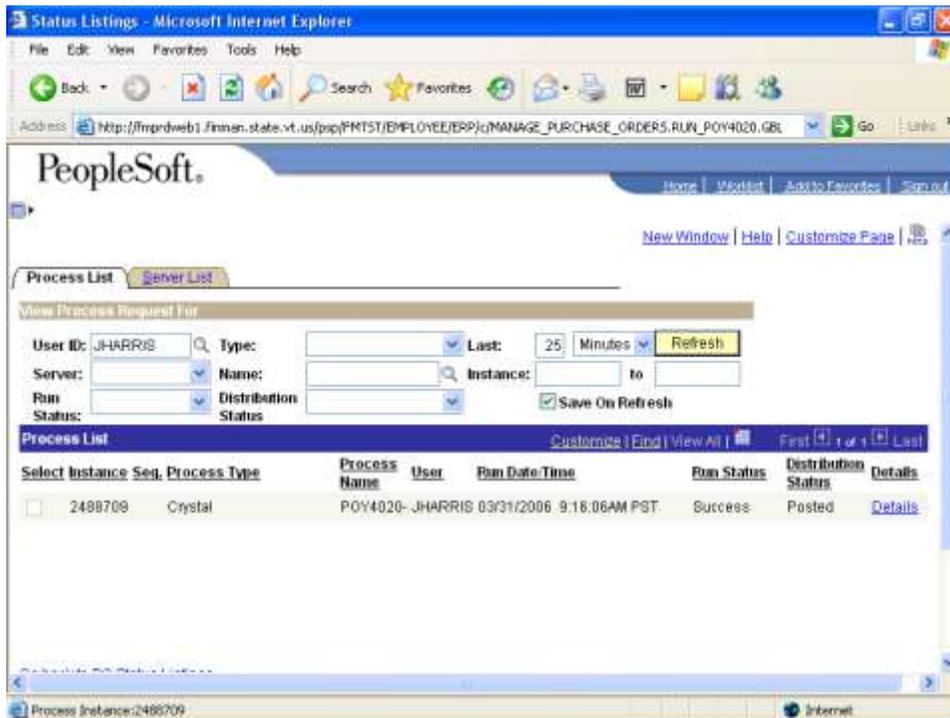
Report Request Parameters Page



Process Scheduler Request Page



Process Monitor Page



Process Detail Page

Process Detail

Process

Instance: 2488709 Type: Crystal
 Name: POY4020 Description: Order Status By Vendor
 Run Status: Success Distribution Status: Posted

Run [Update Process](#)

Run Control ID: Run_POY4020
 Location: Server
 Server: PSNTOR
 Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/31/2006 9:19:08AM PST [Parameters](#) Transfer
 Run Anytime After: 03/31/2006 9:16:06AM PST [Message Log](#)
 Began Process At: 03/31/2006 9:19:33AM PST Batch Timings
 Ended Process At: 03/31/2006 9:19:44AM PST [View Log/Trace](#)

Process Instance: 2488709

View Log/Trace Page

View Log/Trace

Report

Report ID: 2651 Process Instance: 2488709 [Message Log](#)
 Name: POY4020 Process Type: Crystal
 Run Status: Success

Order Status By Vendor

Distribution Details

Distribution Node: FDMVEBCR Expiration Date: 04/07/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/31/2006 9:19:44.000000AM PST
POY4020-2488709.PDF	54,352	03/31/2006 9:19:44.000000AM PST
PeopleSoft Trace File	471	03/31/2006 9:19:44.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488709

PO Detail Listing by Vendor ID (POY4031)

Introduction

Purpose of the Report

The report displays a detail listing of all Purchase Orders (PO) sorted by vendor ID in ascending order. PO details include vendor ID, item description, category, price and contract ID. The run control page allows the user to specify the agency Business Unit, date range, vendor ID and buyer.

Three reports can be produced from the same run control page: PO Detail Listing by PO Date (POY4030), PO Detail Listing by Vendor ID (POY4031), PO Detail Listing by Buyer (POY4032).

This report is used to monitor and review PO detail data by vendor.

Type of Report

Crystal

Navigation Path to the Report

Purchasing > Purchase Orders > Reports > Detail Listings

Report Request Parameters

General Notes:

- Select an existing Run Control ID or enter a new one
- For reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. RUN_POY4030)
- An asterisk * preceding the field name indicates input is required

Report Request Parameters		see screenshots below
In This Field	Enter	Notes
From Date:	type date or use the lookup to select	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date:	type date or use the lookup to select	

Business Unit	type agency PO Business Unit or use the lookup to select	leave blank to display all Business Units for selected report parameters specify Business Unit to display data for one Business Unit
Vendor Set ID	default is STATE	field is grayed out after a Business unit is selected. If no BU is selected STATE is recommended
Vendor ID:	type vendor ID or use the lookup to select	leave blank to display all vendor IDs for selected report parameters specify vendor ID to display data for one vendor ID
Buyer	type buyer or use the lookup to select	leave blank to display all buyers for selected report parameters specify buyer to display data for one buyer
	push the save button to save report parameters	save reports that you want to run on a regular basis
	push the run control button	on the Process Scheduler Request page
Server Name	Select "PSNTCR"	This is the server for Crystal Reports
Process List	Select "PO Detail Listing By Vendor"	To select the proper report
	Click the "Ok" button	This runs the report and returns you to the Report Request Parameters Page
Process Monitor	click the Process Monitor link	on the Process List tab <ul style="list-style-type: none"> view the processing status of the report click the refresh button until the Run Status is "Success" and the Distribution Status is "Posted"
Details	Click the "Details" link	Opens the Process Detail Page
View Log/Trace	Click the "View Log/Trace" link	Opens the View Log/Trace Page
POY4031- #####.PDF	Click the link for the PDF file	This opens the report

Report Request Parameters page

PO Detail Listings - Microsoft Internet Explorer

Address: http://fmdrweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4030.GBL

PeopleSoft. Home View List Sign Out

New Window Help Customize Page

PO Detail Listings

Run Control ID: RUN_POY4030 Report Manager Process Monitor Run

Language: English Process Instance: 2490712

Report Request Parameters

From Date: 07/01/2004 Through Date: 07/31/2004

Business Unit: 02300

Vendor SetId: STATE

Vendor ID:

Buyer:

Process Instance: 2490712

Process Scheduler Request page

PO Detail Listings - Microsoft Internet Explorer

Address: http://fmdrweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4030.GBL

PeopleSoft. Home View List Sign Out

New Window Help Customize Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: RUN_POY4030

Server Name: PSNTCR Run Date: 03/28/2006

Recurrence: Run Time: 9:56:43AM Reset to Current DateTime

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	PO Detail Listing By PO Date	POY4030-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Detail Listing By Vendor	POY4031-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Detail Listing By Buyer	POY4032-	Crystal	Web	PDF	Distribution

OK Cancel

Process Instance: 2490712

Process Monitor Page

Process List

View Process Request For

User ID: JHARRIS Type: Last: 1 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490712		Crystal	POY4031- JHARRIS	JHARRIS	03/28/2006 9:56:20AM PST	Success	Posted	Details
<input type="checkbox"/>	2490704		Crystal	POY4031- JHARRIS	JHARRIS	03/28/2006 9:34:57AM PST	Success	Posted	Details
<input type="checkbox"/>	2490697		Crystal	POY4013- JHARRIS	JHARRIS	03/28/2006 8:19:26AM PST	Success	Posted	Details
<input type="checkbox"/>	2490633		Crystal	POY4012- JHARRIS	JHARRIS	03/27/2006 2:39:31PM PST	Success	Posted	Details
<input type="checkbox"/>	2490620		Crystal	POY4008- JHARRIS	JHARRIS	03/27/2006 2:15:34PM PST	Success	Posted	Details
<input type="checkbox"/>	2490618		Crystal	POY4008- JHARRIS	JHARRIS	03/27/2006 2:14:22PM PST	Success	Posted	Details

Process Detail page

Process Detail

Instance: 2490712 Type: Crystal

Name: POY4031- Description: PO Detail Listing By Vendor

Run Status: Success Distribution Status: Posted

Run Control ID: RUN_POY4030

Location: Server

Server: PSNTOR

Recurrence:

Update Process

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Event/Time **Actions**
 Request Created On: 03/28/2006 9:56:26AM PST [Parameters](#) Transfer
 Run Anytime After: 03/28/2006 9:56:20AM PST [Message Log](#)
 Began Process At: 03/28/2006 9:56:58AM PST [Batch Timings](#)
 Ended Process At: 03/28/2006 9:57:05AM PST [View Log/Trace](#)

View Log/Trace page

View Log/Trace

Report

Report ID: 4676 Process Instance: 2490712 [Message Log](#)

Name: POY4031- Process Type: Crystal

Run Status: Success

PO Detail Listing By Vendor

Distribution Details

Distribution Node: FDMWEBCR Expiration Date: 04/04/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/28/2006 9:57:05.000000AM PST
POY4031-_2490712.PDF	73,016	03/28/2006 9:57:05.000000AM PST
PeopleSoft Trace File	471	03/28/2006 9:57:05.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2490712

Example of Report Output

Report ID: POY4031
Run Date: 03/28/06
Run Control: R06_POY4031

Page No: 1
Run Date: 03/28/06
Run Time: 0:00:01.00

PO Detail Listing: 03/28/06 Date: 03/28/06
Vendor Item: 433010001

Item	PO ID	PO Date	Location Item ID	Item Description	Vendor Item	Category	Order Qty	UOM	UOM	Price	Contract	Line No
0000	000000001	03/28/06	1	Wdy crl phone - wireless	0000	1.00	EA	USD		188.33		1
0000	000000002	03/28/06	2	Wdy crl phone - Admin	0000	1.00	EA	USD		98.00		1
0000	000000002	03/28/06	1	Wdy crl phone - Comp	0000	1.00	EA	USD		48.00		1
0000	000000002	03/28/06	1	Wdy crl phone - Admin	0000	1.00	EA	USD		71.47		1
0000	000000002	03/28/06	2	Wdy crl phone - Int	0000	1.00	EA	USD		823.91		1
0000	000000002	03/28/06	3	Wdy crl phone - Educ	0000	1.00	EA	USD		114.00		1
0000	000000001	03/28/06	1	Del phone - Auto - Comp	0000	1.00	EA	USD		31.77		1
0000	000000001	03/28/06	1	Del phone - Auto - Dispatch	0000	1.00	EA	USD		108.00		1
0000	000000001	03/28/06	2	Del phone - Auto - Admin	0000	1.00	EA	USD		37.74		1
0000	000000001	03/28/06	1	Del phone - Auto - Admin	0000	1.00	EA	USD		87.11		1
0000	000000001	03/28/06	2	Del phone - Auto - Int	0000	1.00	EA	USD		484.42		1
0000	000000001	03/28/06	3	Del phone - Auto - Educ	0000	1.00	EA	USD		31.70		1

PO Detail Listing by Buyer (POY4032)

Report Information

Purpose of the Report

This report provides detailed PO information sorted by buyer.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Detail Listings

Report Execution Procedure

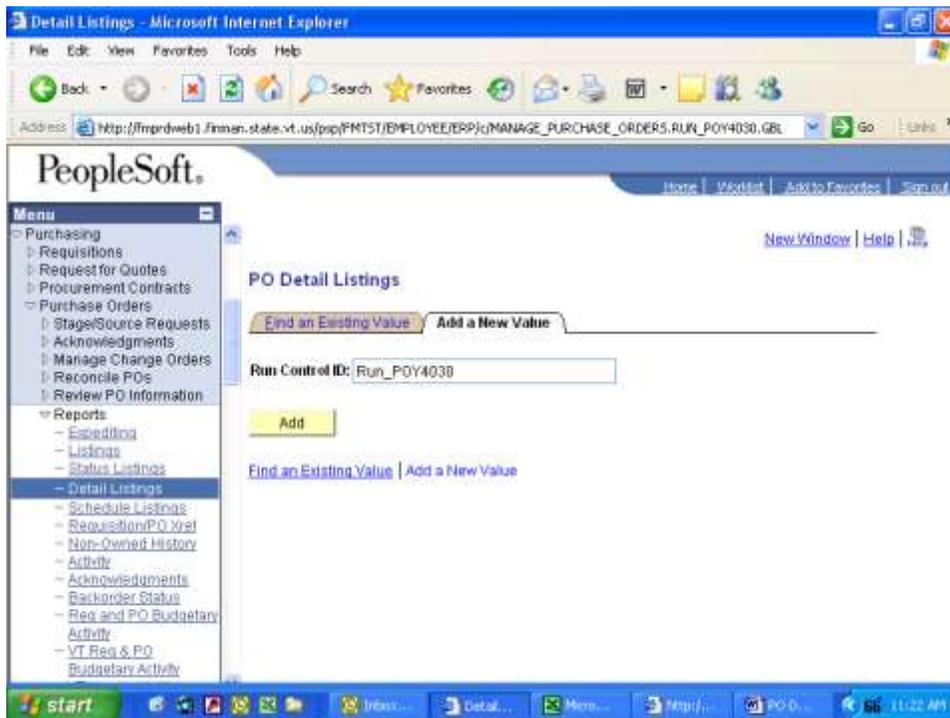
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4030)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or use pop-up calendar to select.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or use pop-up calendar to select.	
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
Vendor Set ID	Enter Vendor Set ID or use lookup to select.	Leave field blank to select all Vendor Set ID's.
Vendor ID	Enter Vendor ID or use lookup to select.	Leave field blank to select all Vendor ID's.
Buyer	Enter Buyer or use lookup to select.	Leave field blank to select all Buyers.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Select	Check the box for “PO Detail Listing by Buyer” – POY4032-	
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.

Report Steps		see screenshot below
In This Field/Link	Action	Notes
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4032-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page

Detail Listings - Microsoft Internet Explorer

Address: http://fmrpdweb1.finan.state.vt.us/psip/FMTST/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4030.GBL

PeopleSoft

Home | MyList | Add to Favorites | Sign out

New Window | Help | Customize Page

PO Detail Listings

Run Control ID: Run_POY4032 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameters

From Date: 07/01/2004 Through Date: 07/31/2004

Business Unit: 02150

Vendor SetId: STATE

Vendor ID:

Buyer:

Process Scheduler Request Page

Detail Listings - Microsoft Internet Explorer

Address: http://fmrpdweb1.finan.state.vt.us/psip/FMTST/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4030.GBL

PeopleSoft

Home | MyList | Add to Favorites | Sign out

New Window | Help | Customize Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY4032

Server Name: PSMTCR Run Date: 03/31/2006

Recurrence: Run Time: 1:11:09PM [Reset to Current DateTime](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	PO Detail Listing By PO Date	POY4030-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Detail Listing By Vendor	POY4031-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Detail Listing By Buyer	POY4032-	Crystal	Web	PDF	Distribution

OK Cancel

PO Detail Listing By PO Date (POY4030)

Report Information

Purpose of the Report

This report provides detailed PO information sorted by PO date.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Detail Listings

Report Execution Procedure

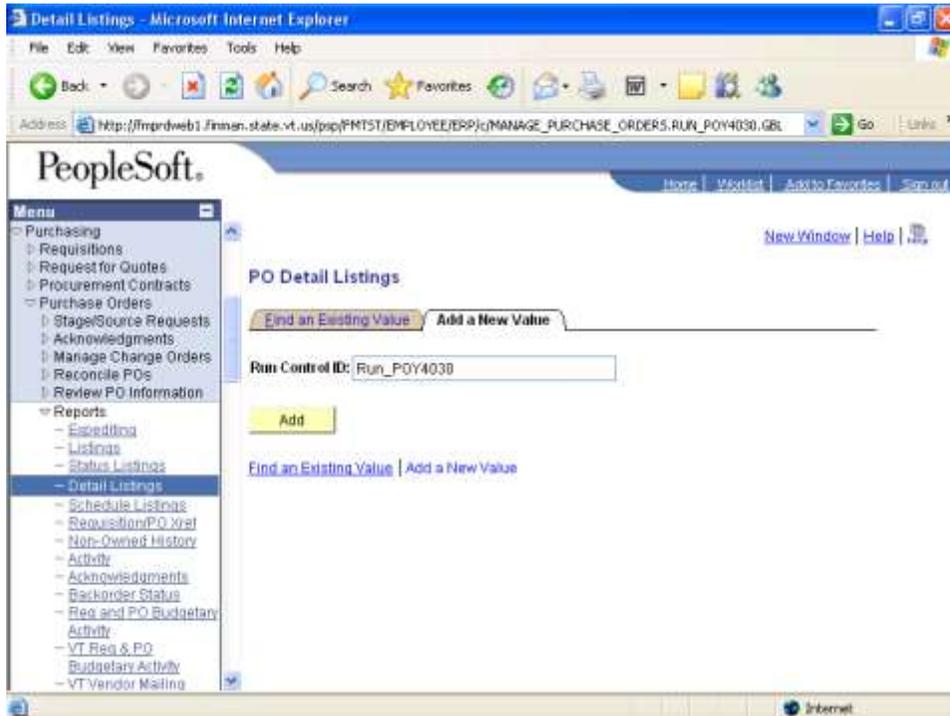
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4030)

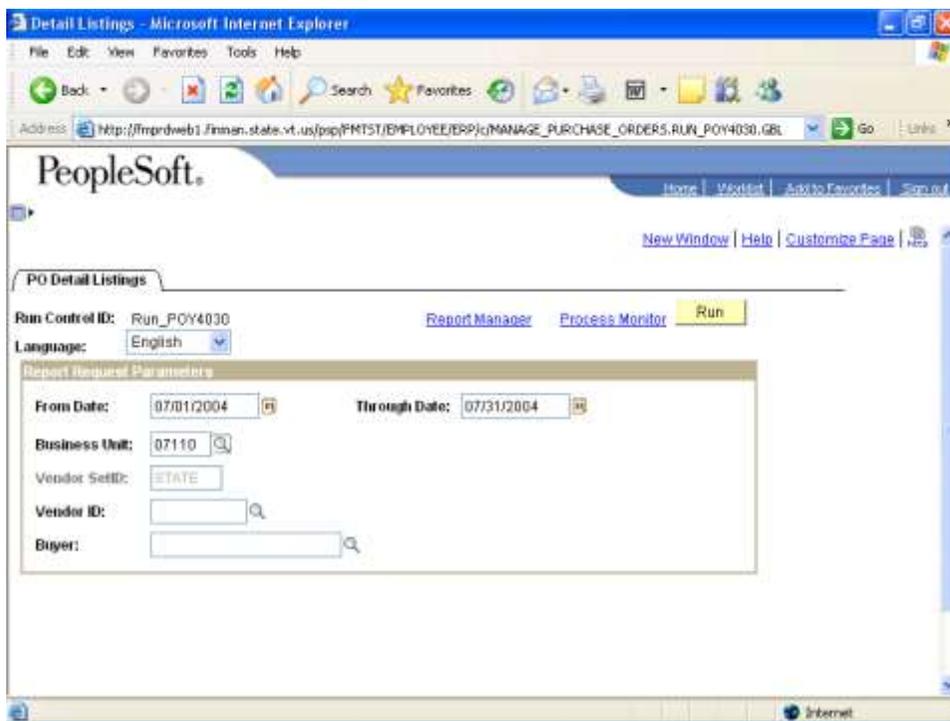
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or select from pop-up calendar.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or select from pop-up calendar.	
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
Vendor Set ID	Enter Vendor Set ID or use lookup to select.	“STATE” is recommended and defaults in once a Business Unit is selected.
Vendor ID	Enter Vendor ID or use lookup to select.	Leave field blank to select all Vendor ID’s.

Report Steps		see screenshot below
Buyer	Enter Buyer or use lookup to select.	Leave field blank to select all Buyers.
In This Field/ Link	Action	Notes
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Process List Select	Select “PO Detail Listing By PO Date”	To select the proper report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4030-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY4030

Server Name: PSMTCR Run Date: 03/31/2006
 Recurrence: Run Time: 11:02:51AM [Reset to Current DateTime](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PO Detail Listing By PO Date	POY4030-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Detail Listing By Vendor	POY4031-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Detail Listing By Buyer	POY4032-	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

Process List [Server List](#)

View Process Request For

User ID: JHARRIS Type: Last: 25 Minutes [Refresh](#)
 Server: Name: Instance: to
 Run Status: Distribution Status: Save On Refresh

Select	Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488719	Crystal	POY4030-JHARRIS	JHARRIS	03/31/2006 11:02:51AM PST	Success	Posted	Details

Process Instance: 2488719

Process Detail Page

Process Detail

Process

Instance: 2488719 Type: Crystal
 Name: POY4030- Description: PO Detail Listing By PO Date
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: Run_POY4030
 Location: Server
 Server: PSNTCR
 Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/31/2006 11:11:57AM PST [Parameters](#) Transfer
 Run Anytime After: 03/31/2006 11:02:51AM PST [Message Log](#)
 Began Process At: 03/31/2006 11:12:21AM PST Batch Timings
 Ended Process At: 03/31/2006 11:12:30AM PST [View Log/Trace](#)

Process Instance: 2488719

View Log/Trace Page

View Log/Trace

Report

Report ID: 2657 Process Instance: 2488719 [Message Log](#)
 Name: POY4030- Process Type: Crystal
 Run Status: Success

PO Detail Listing By PO Date

Distribution Details

Distribution Node: FDMVEBCR Expiration Date: 04/07/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/31/2006 11:12:30.000000AM PST
POY4030- 2488719 PDF	45,215	03/31/2006 11:12:30.000000AM PST
PeopleSoft Trace File	489	03/31/2006 11:12:30.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488719

Example of Report Output

Report ID: POY4030
User ID: JHARRIS
Run Control: Run_POY4030

PeopleSoft Purchasing
PO DETAIL LISTING BY PO DATE

Page No. 3/31/2004
Run Date 11:10:18 AM
Run Time

PO Dates Included: 7/1/2004 Thru: 7/31/2004
Business Unit: 07110

PO Date	PO ID	Vendor Id	Line/Sched Item ID	Item Description	Vendor Item	Catgry	Order Qty	UOM	CUR	Price Contract	Line No
7/21/2004	00PG(04)	0000039906	1 1	2000 CDBG BLOCK GRANT		00001	1.00	EA	USD	24,485.00	0
7/21/2004	03PG(15)	0000040055	1 1	2003 CDBG BLOCK GRANT		00001	1.00	EA	USD	29,225.00	0
7/21/2004	03PG(17)	0000040134	1 1	2003 CDBG BLOCK GRANT		00001	1.00	EA	USD	30,000.00	0
7/21/2004	04IG(03)	0000040616	1 1	CDBG BLOCK GRANT		00001	1.00	EA	USD	248,028.00	0
7/21/2004	04IG(05)	0000040414	1 1	2004 CDBG BLOCK GRANT		00001	1.00	EA	USD	140,000.00	0
7/21/2004	04IG(06)	0000040245	1 1	2004 CDBG BLOCK GRANT		00001	1.00	EA	USD	484,100.00	0
7/21/2004	04PG(01)	0000040761	1 1	2004 CDBG BLOCK GRANT		00001	1.00	EA	USD	27,000.00	0

11 x 8.5 in 1 of 1

PO Listing by Buyer (POY4012)

Introduction

Purpose of the Report

The report displays a listing of Purchase Orders (PO) sorted by buyer in alphabetical order. PO data displayed on the report includes PO ID, contract ID, buyer ID, vendor ID/name and PO status. The run control page allows the user to specify agency PO Business Unit, date range, vendor Set ID, vendor ID, buyer and PO status.

Four Reports can be produced from the same run control page: PO Listing by PO Date (POY4010), PO Listing by Vendor ID (POY4011), PO Listing by Buyer (POY4012), and PO Listing by PO Status (POY4013).

This report is used to monitor and review PO data by buyer.

Type of Report

Crystal

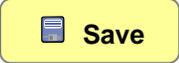
Navigation Path to the Report

Purchasing > Purchase Orders > Reports > Listings

Report Request Parameters

General Notes:

- Select an existing Run Control ID or enter a new one
- For reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. RUN_POY4010)
- An asterisk * preceding the field name indicates input is required

Report Request Parameters		see screenshots below
In This Field	Enter	Notes
From Date:	type date or use the lookup to select	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date:	type date or use the lookup to select	
Business Unit	type agency PO Business Unit or use the lookup to select	leave blank to display all business units for selected report parameters specify vendor ID to display data for one business unit
Vendor Set ID	Core default is STATE	use STATE for most purchasing reports
Vendor ID:	type vendor ID or use the lookup to select	leave blank to display all vendor IDs for selected report parameters specify vendor ID to display data for one vendor ID
Buyer	type buyer or use the lookup to select	leave blank to display all buyers for selected report parameters specify buyer to display data for one buyer
PO Status:	type status or use the dropdown menu to select	leave blank to display all status types for the selected report parameters specify status to display data for one status type
	push the save button to save report parameters	save reports that you want to run on a regular basis
	push the run control button	on the Process Scheduler Request page
Server Name	Select "PSNTCR"	This is the server for Crystal Reports

Report Request Parameters (continued)		see screenshot below
In This Field	Enter	Notes
Process List	PO Listing By Buyer	To select the proper report
	Click the "Ok" button	This runs the report and returns you to the Report Request Parameters Page
Process Monitor	click the Process Monitor link	<ul style="list-style-type: none"> view the processing status of the report click the refresh button until the Run Status is "Success" and the Distribution Status is "Posted"
Details	Click the Details link	Opens the Process Detail page
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page
POY4012- #####.PDF	Click the link for the PDF file	This opens the report

Report Request Parameters Page

PO Listings - Microsoft Internet Explorer

Address: http://fmdeweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL

PeopleSoft

Run Control ID: Run_POY_4010 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameters

Business Unit: 02300

From Date: 09/01/2004 Through Date: 09/31/2004

Vendor SetId: STATE

Vendor ID:

Buyer:

PO Status:

Process Instance: 2490633

Process Scheduler Request Page

PO Listings - Microsoft Internet Explorer

Address: http://fmdeweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL

PeopleSoft

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY_4010

Server Name: PSNTCR Run Date: 03/27/2006

Recurrence: Run Time: 3:03:44PM [Reset to Current DateTime](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	PO Listing by PO Date	POY4010-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Vendor	POY4011-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Listing By Buyer	POY4012-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Status	POY4013-	Crystal	Web	PDF	Distribution

OK Cancel

Process Instance: 2490633

Process Monitor Page

The screenshot shows the 'Process List' page in a PeopleSoft application. The browser address bar indicates the URL: http://fmdeweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL. The page features a search section with the following fields:

- User ID: JHARRIS
- Type: [Dropdown]
- Last: 1 Hours
- Refresh button
- Server: [Dropdown]
- Name: [Text]
- Instance: [Text] to [Text]
- Run Status: [Dropdown]
- Distribution Status: [Dropdown]
- Save On Refresh checkbox (checked)

Below the search section is a table titled 'Process List' with the following columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. A single row is visible:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490633		Crystal	POY4012-JHARRIS	JHARRIS	03/27/2006 2:39:31PM PST	Success	Posted	Details

Process Detail page

The screenshot shows the 'Process Detail' page for instance 2490633. The page is divided into several sections:

- Process Information:**
 - Instance: 2490633
 - Type: Crystal
 - Name: POY4012
 - Description: PO Listing By Buyer
 - Run Status: Success
 - Distribution Status: Posted
- Run Information:**
 - Run Control ID: Run_POY_4010
 - Location: Server
 - Server: PSNTOR
 - Recurrence: [Empty]
- Update Process Actions:**
 - Hold Request
 - Queue Request
 - Cancel Request
 - Delete Request
 - Restart Request
- Data/Time:**
 - Request Created On: 03/27/2006 2:39:38PM PST
 - Run Anytime After: 03/27/2006 2:39:31PM PST
 - Began Process At: 03/27/2006 2:40:12PM PST
 - Ended Process At: 03/27/2006 2:40:23PM PST
- Actions:**
 - [Parameters](#) Transfer
 - [Message Log](#)
 - Batch Timings
 - [View Log/Trace](#)

View Log/Trace page

View Log/Trace

Report ID: 4610 Process Instance: 2490633 [Message Log](#)

Name: POY4012 Process Type: Crystal

Run Status: Success

PO Listing By Buyer

Distribution Details

Distribution Node: FDMWEBCR Expiration Date: 04/03/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/27/2006 2:40:23.000000PM PST
POY4012_2490633.PDF	40,876	03/27/2006 2:40:23.000000PM PST
PeopleSoft Trace File	471	03/27/2006 2:40:23.000000PM PST

Distribute To

Distribution ID	Type	Distribution ID
User		JHARRIS

Process Instance: 2490633

Example of Report Output

Report ID: PO4612 PeopleSoft Procuring Page No: 1

User ID: JARRIS PO LISTING BY BUYER Run Date: 03/27/06

Run Control: POY_4012 Run Time: 2:38:14 PM

PO Dates Included: 01/01/2004 - 03/31/2004

Report: POListing

PO ID	Vendor ID	PO Date	Vendor ID	Item	PO Status	Hold	Qty	Currency	Amount
02800	000000474	00/00/00000000000000000000	0	0	0	0	0	USD	70.82
02800	000000476	00/00/00000000000000000000	0	0	0	0	0	USD	171.83
02800	000000476	00/00/00000000000000000000	0	0	0	0	0	USD	228.29
02800	000000480	00/00/00000000000000000000	0	0	0	0	0	USD	31.99
02800	000000494	00/00/00000000000000000000	0	0	0	0	0	USD	11.34

1 of 2

PO Listing by PO Date (POY4010)

Report Information

Purpose of the Report

This report provides PO information sorted by PO date.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Listings

Report Execution Procedure

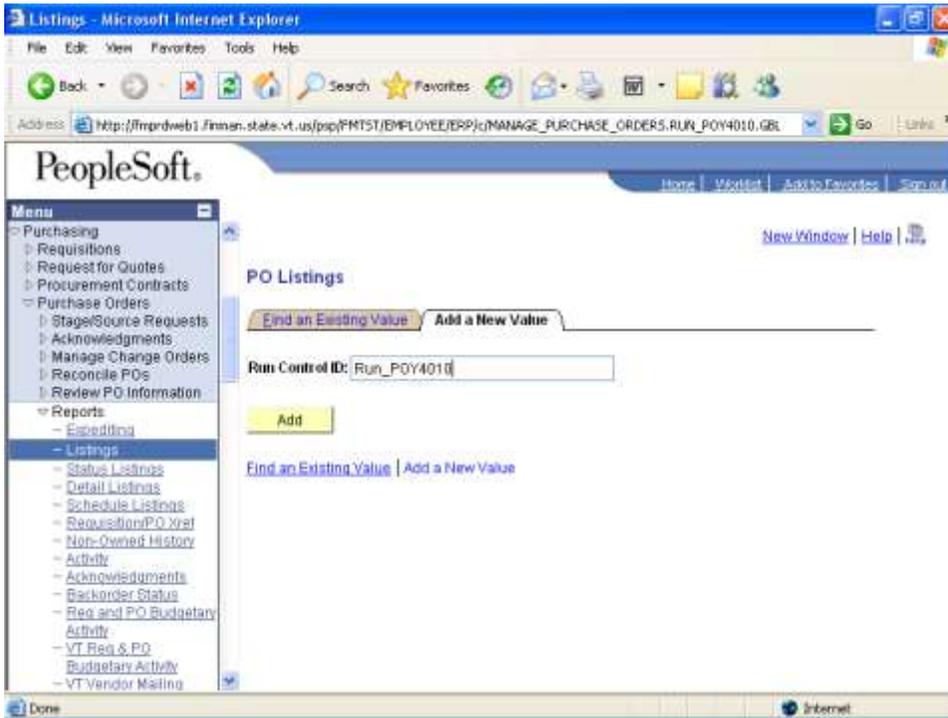
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4010)

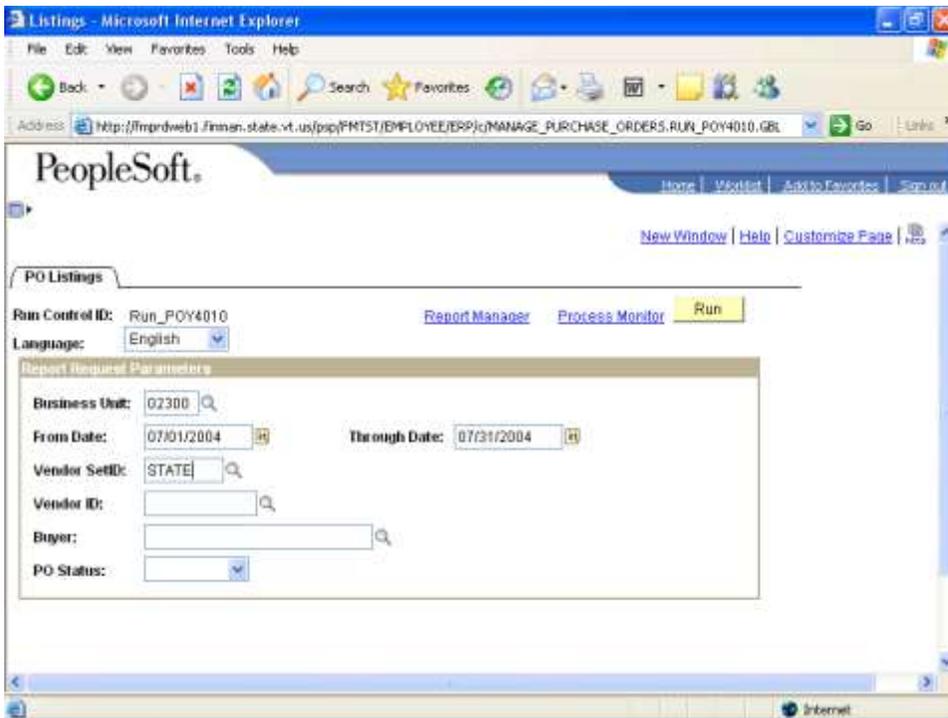
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
From Date	Enter desired From Date or select date from the pop-up calendar.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter desired Through Date or select date from the pop-up calendar.	
Vendor SetID	Enter Vendor Set ID or use lookup to select.	Leave field blank to select all Vendor SetID's.
Vendor ID	Enter Vendor ID or use lookup to select.	Leave field blank to select all Vendor ID's.
Buyer	Enter Buyer or use lookup to select.	Leave field blank to select all Buyers.
PO Status	Select PO Status	Leave field blank to select all PO Statuses.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTPCR”	This is the server for Crystal Reports
Process List Select	Select “PO Listing by PO Date”	To select the right report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> • To view the processing status of the report. • Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4010-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY4010

Server Name: PSMTCR Run Date: 03/31/2006
 Recurrence: Run Time: 7:30:08AM [Reset to Current DateTime](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PO Listing by PO Date	POY4010-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Vendor	POY4011-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Buyer	POY4012-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Status	POY4013-	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

Process List [Server List](#)

View Process Request For

User ID: JHARRIS Type: Last: 25 Minutes [Refresh](#)
 Server: Name: Instance: to
 Run Status: Distribution Status: Save On Refresh

Select	Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488696	Crystal	POY4010-JHARRIS	JHARRIS	03/31/2006 7:30:08AM PST	Success	Posted	Details

Process Instance: 2488696

Process Detail Page

Process Detail

Process

Instance: 2488696	Type: Crystal
Name: POY4010-	Description: PO Listing by PO Date
Run Status: Success	Distribution Status: Posted

Run Control ID: Run_POY4010

Location: Server

Server: PSNTCR

Recurrence:

Actions:

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

Data/Time

Request Created On: 03/31/2006 7:33:34AM PST	Parameters Transfer
Run Anytime After: 03/31/2006 7:30:09AM PST	Message Log
Began Process At: 03/31/2006 7:34:13AM PST	Batch Timings
Ended Process At: 03/31/2006 7:34:25AM PST	View Log/Trace

Process Instance: 2488696

View Log/Trace Page

View Log/Trace

Report

Report ID: 2643	Process Instance: 2488696	Message Log
Name: POY4010-	Process Type: Crystal	
Run Status: Success		

PO Listing by PO Date

Distribution Details

Distribution Node: FDMVEBCR	Expiration Date: 04/07/2008
------------------------------------	------------------------------------

File List

Name	File Size (bytes)	DateTime Created
Message Log	0	03/31/2006 7:34:25.000000AM PST
POY4010- 2488696 PDF	43,726	03/31/2006 7:34:25.000000AM PST
PeopleSoft Trace File	471	03/31/2006 7:34:25.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488696

Example of Report Output

Report ID: POY4010
User ID: JHARRIS
Run Control: Run_POY4010

PeopleSoft Purchasing
PO LISTING BY PO DATE

Page No. 1
Run Date 3/5/2008
Run Time 7:32:11 AM

PO Dates Included: 7/1/2004 Thru: 7/31/2004
Business Unit: 02300

PO Date	PO ID	Contract ID	Change	Buyer	Vendor ID	Name	PO Status	Hold	Rev	Curr	Amount
7/2/2004	000000826	000000000000000000000004471	0 1	Production	0000001119	Heritage Propane	Compl	N	R	USD	121.81
7/2/2004	000000827	000000000000000000000006425	0 0	Production	0000018468	CDIW-G	Compl	N	N	USD	451.48
7/2/2004	000000828	000000000000000000000006663	0 0	Production	0000014256	Crystal Rock Bottled Water	Compl	N	N	USD	71.75
7/2/2004	000000829	00000000000000000000000365	0 1	Production	0000002356	Portland Glass	Compl	N	R	USD	243.22
7/2/2004	000000830	00000000000000000000000218	0 1	Production	0000010331	United Parcel Service	Compl	N	R	USD	20.16
7/2/2004	000000831	000000000000000000000002340	0 1	Production	0000000983	Unicel	Compl	N	N	USD	241.91
7/2/2004	000000832	000000000000000000000002340	0 0	Production	0000000983	Unicel	Compl	N	N	USD	45.65
7/2/2004	000000833	000000000000000000000002340	0 0	Production	0000000983	Unicel	Compl	N	N	USD	770.70
7/2/2004	000000834	00000000000000000000000034	0 1	Production	0000008031	ADAP Software	Compl	N	N	USD	608.40
7/6/2004	000000835	00000000000000000000000256	0 0	Production	0000005932	Boise Cascade Office Products	Compl	N	N	USD	29.90
7/6/2004	000000836	00000000000000000000000256	0 0	Production	0000005932	Boise Cascade Office Products	Compl	N	N	USD	96.30
7/6/2004	000000837	00000000000000000000000256	0 0	Production	0000005932	Boise Cascade Office Products	Compl	N	N	USD	20.70
7/6/2004	000000838	00000000000000000000000256	0 0	Production	0000005932	Boise Cascade Office Products	Compl	N	N	USD	27.93
7/6/2004	000000839	00000000000000000000000256	0 0	Production	0000005932	Boise Cascade Office Products	Compl	N	N	USD	77.58

PO Listing by PO Status (POY4013)

Introduction

Purpose of the Report

The report displays a listing of Purchase Orders (PO) sorted by PO status. PO data displayed on the report includes PO ID, contract ID, buyer ID, vendor ID/name and PO status. The run control page allows the user to specify agency PO Business Unit, date range, vendor Set ID, vendor ID, buyer and PO status.

Four Reports can be produced from the same run control page: PO Listing by PO Date (POY4010), PO Listing by Vendor ID (POY4011), PO Listing by Buyer (POY4012), PO Listing by PO Status (POY4013).

This report is used to monitor and review PO data by PO status.

Type of Report

Crystal

Navigation Path to the Report

Purchasing > Purchase Orders > Reports > PO Listings

Report Request Parameters

General Notes:

- Select an existing Run Control ID or enter a new one
- For reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY_4010)
- An asterisk * preceding the field name indicates input is required

Report Request Parameters		see screenshots below
In This Field	Enter	Notes
From Date:	type date or use the lookup to select	<ul style="list-style-type: none"> to display one day - enter same date in both fields to display a date range – enter beginning and end date to display year to date – enter 07/01/YYYY and current date
Through Date:	type date or use the lookup to select	
Business Unit	type agency PO Business Unit or use the lookup to select	leave blank to display all business units for selected report parameters specify business unit to display data for one business unit
Vendor Set ID	default is STATE	use STATE for most purchasing reports
Vendor ID:	type vendor ID or use the lookup to select	leave blank to display all vendor IDs for selected report parameters specify vendor ID to display data for one vendor ID
Buyer	type buyer or use the lookup to select	leave blank to display all buyers for selected report parameters specify buyer to display data for one buyer
PO Status:	type status or use the dropdown menu to select	leave blank to display all status types for the selected report parameters specify status to display data for one status type
	push the save button to save report parameters	save reports that you want to run on a regular basis
	push the run control button	on the Process Scheduler Request page

Report Request Parameters (continued)		see screenshot below
In This Field	Enter	Notes
Server Name	Select "PSNTCR"	This is the server for Crystal reports
Process List	Select" PO Listing by Status"	To select the proper report
	Click the "Ok" button	This runs the report and returns you to the Report Request Parameters Page
Process Monitor	click the Process Monitor link	<p>on the Process List tab</p> <ul style="list-style-type: none"> view the processing status of the report click the refresh button until the Run Status is "Success" and the Distribution Status is "Posted"
Details	Click the Details Link	Opens the Process Detail page
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page
POY4013- #####.PDF	Click the link for the PDF file	This opens the report

Report Request Parameters Page

PO Listings - Microsoft Internet Explorer
Address: http://fmdeweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL

PeopleSoft

PO Listings

Run Control ID: Run_POY_4010 Report Manager Process Monitor Run

Language: English

Report Request Parameters

Business Unit: 02300

From Date: 08/01/2004 Through Date: 08/31/2004

Vendor SetID: STATE

Vender ID: []

Buyer: []

PO Status: []

Process Scheduler Request page

PO Listings - Microsoft Internet Explorer
Address: http://fmdeweb.firman.state.vt.us/psp/FMDEV/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL

PeopleSoft

New Window | Help | Customize Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY_4010

Server Name: PSNTCR Run Date: 03/28/2006

Recurrence: [] Run Time: 8:19:28AM Reset to Current DateTime

Time Zone: []

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	PO Listing by PO Date	POY4010-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Vendor	POY4011-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Buyer	POY4012-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Listing By Status	POY4013-	Crystal	Web	PDF	Distribution

OK Cancel

Process Monitor Page

The screenshot shows the 'Process List' page in the PeopleSoft application. The browser window title is 'PO Listings - Microsoft Internet Explorer'. The address bar shows the URL: http://fmdeweb.firman.state.vt.us/psp/fmdev/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL. The page header includes the PeopleSoft logo and navigation links for 'Home', 'View List', and 'Sign out'.

Below the header, there are tabs for 'Process List' (selected) and 'Server List'. A 'View Process Request Filter' section contains several input fields: 'User ID' (JHARRIS), 'Type' (dropdown), 'Last' (1), 'Hours' (dropdown), 'Refresh' button, 'Server' (dropdown), 'Name' (input), 'Instance' (input), 'Run Status' (dropdown), 'Distribution Status' (dropdown), and a 'Save On Refresh' checkbox.

The main content area is a table titled 'Process List' with columns: 'Select', 'Instance Seq.', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. A single row is visible with the following data:

Select	Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490697	Crystal	POY4013-	JHARRIS	03/28/2006 8:19:28AM PST	Success	Posted	Details

At the bottom of the page, there is a link 'Go back to PO Listings' and a status bar showing 'Process Instance: 2490697' and 'Internet'.

Process Detail page

The screenshot shows the 'Process Detail' page in the PeopleSoft application. The browser window title is 'PO Listings - Microsoft Internet Explorer'. The address bar shows the URL: http://fmdeweb.firman.state.vt.us/psp/fmdev/EMPLOYEE/ERP/c/MANAGE_PURCHASE_ORDERS.RUN_POY4010.GBL. The page header includes the PeopleSoft logo and navigation links for 'Home', 'View List', and 'Sign out'.

The main content area is titled 'Process Detail' and contains the following information:

Process

Instance: 2490697 Type: Crystal
 Name: POY4013 Description: PO Listing By Status
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: Run_POY_4010 Hold Request
 Location: Server Queue Request
 Server: PSNTCR Cancel Request
 Recurrence: Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/28/2006 8:20:08AM PST [Parameters](#) Transfer
 Run Anytime After: 03/28/2006 8:19:28AM PST [Message Log](#)
 Begin Process At: 03/28/2006 8:20:38AM PST Batch Timings
 Ended Process At: 03/28/2006 8:20:55AM PST [View Log/Trace](#)

At the bottom of the page, there is a status bar showing 'Process Instance: 2490697' and 'Internet'.

View Log/Trace page

View Log/Trace

Report

Report ID: 4661 Process Instance: 2490697 [Message Log](#)

Name: POY4013 Process Type: Crystal

Run Status: Success

PO Listing By Status

Distribution Details

Distribution Node: FDMWEBCR Expiration Date: 04/04/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/28/2006 8:20:55.000000AM PST
POY4013_2490697.PDF	49,998	03/28/2006 8:20:55.000000AM PST
PeopleSoft Trace File	471	03/28/2006 8:20:55.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2490697

Example of Report Output

Report ID: 4661 Name: POY4013 Run Date: 03/28/06

Run Status: Success Run Time: 8:18:41 AM

PO Listing By Status

BU	PO ID	Contract ID	PO Order	PO Date	Vendor ID	Item	Item Description	Item	Item	Item	Ship Date
0200	00000982	000000000000000000000000	0	8/3/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000981	000000000000000000000000	0	8/4/2004	000018668	ODYS-O	JHENVD	N	N	N	1/8
0200	00000984	000000000000000000000000	0	8/4/2004	000008712	BAVANSI NA	JHENVD	N	N	N	1/8
0200	00000989	000000000000000000000000	0	8/6/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000986	000000000000000000000000	0	8/5/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000987	000000000000000000000000	0	8/5/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000988	000000000000000000000000	0	8/6/2004	000017112	DocConnection	JHENVD	N	N	N	1/8
0200	00000989	000000000000000000000000	0	8/6/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000970	000000000000000000000000	0	8/5/2004	000000118	Heritage Process	JHENVD	N	N	N	1/8
0200	00000971	000000000000000000000000	0	8/5/2004	000014208	Clyde Rock Batted Base	JHENVD	N	N	N	1/8
0200	00000971	000000000000000000000000	0	8/12/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000973	000000000000000000000000	0	8/12/2004	000014028	Univest Corporation	JHENVD	N	N	N	1/8
0200	00000976	000000000000000000000000	0	8/17/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000976	000000000000000000000000	0	8/17/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000976	000000000000000000000000	0	8/17/2004	000008912	State Cause Office Products	HOUJE	N	N	N	1/8
0200	00000977	000000000000000000000000	0	8/19/2004	000008912	Univest	JHENVD	N	N	N	1/8
0200	00000978	000000000000000000000000	0	8/22/2004	000008912	Univest	JHENVD	N	N	N	1/8
0200	00000978	000000000000000000000000	0	8/22/2004	000008912	Univest	JHENVD	N	N	N	1/8
0200	00000988	000000000000000000000000	0	8/14/2004	000014432	Univest	JHENVD	N	N	N	1/8

PO Listing by Vendor (POY4011)

Report Information

Purpose of the Report

This report provides PO information sorted by vendor.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Listings

Report Execution Procedure

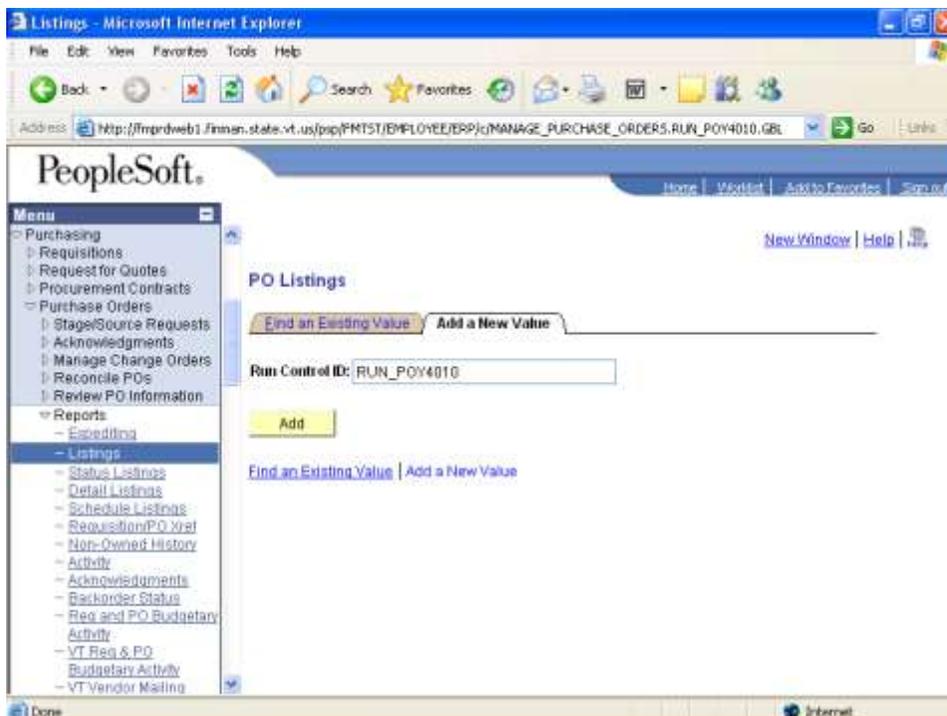
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4010)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
From Date	Enter From Date or use pop-up calendar to select.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or use pop-up calendar to select.	
Vendor Set ID	Enter Vendor SetID or use lookup to select.	“STATE” is recommended
Vendor ID	Enter Vendor ID or use lookup to select.	Leave field blank to select all Vendor ID’s.
Buyer	Enter Buyer or use lookup to select.	Leave field blank to select all Buyers.
PO Status	Select desired PO Status.	Leave field blank to select all PO Statuses.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTPCR”	This is the server for Crystal Reports
Process List Select	PO Listing by Vendor	To select the right report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.

Report Steps		see screenshot below
Format	Choose desired value	PDF is recommended.
In This Field/ Link	Action	Notes
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4011-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page

PeopleSoft

Run Control ID: RUN_POY4010 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameters

Business Unit: 02300

From Date: 08/01/2004 Through Date: 08/15/2004

Vendor SetID: STATE

Vendor ID: 0000005932

Buyer:

PO Status:

Process Scheduler Request Page

PeopleSoft

Process Scheduler Request

User ID: JHARRIS Run Control ID: RUN_POY4010

Server Name: PSNTCR Run Date: 03/31/2006

Recurrence: Run Time: 8:26:13AM [Reset to Current DateTime](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	PO Listing by PO Date	POY4010-	Crystal	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Listing By Vendor	POY4011-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Buyer	POY4012-	Crystal	Web	PDF	Distribution
<input type="checkbox"/>	PO Listing By Status	POY4013-	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

Process List

View Process Request For

User ID: JHARRIS Type: Crystal Last: 25 Minutes Refresh

Server: PSNTCR Name: POY4011 Instance: to

Run Status: Success Distribution Status: Posted Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488699		Crystal	POY4011-JHARRIS	JHARRIS	03/31/2006 8:26:13AM PST	Success	Posted	Details
<input type="checkbox"/>	2488698		Crystal	POY4011-JHARRIS	JHARRIS	03/31/2006 8:17:37AM PST	Success	Posted	Details
<input type="checkbox"/>	2488697		Crystal	POY4011-JHARRIS	JHARRIS	03/31/2006 8:16:09AM PST	Success	Posted	Details

Process Detail Page

Process Detail

Instance: 2488699 Type: Crystal

Name: POY4011 Description: PO Listing By Vendor

Run Status: Success Distribution Status: Posted

Run Control ID: RUN_POY4010

Location: Server

Server: PSNTCR

Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Data/Time

Request Created On: 03/31/2006 8:27:25AM PST

Run Anytime After: 03/31/2006 8:26:13AM PST

Began Process At: 03/31/2006 8:27:52AM PST

Ended Process At: 03/31/2006 8:28:07AM PST

[Parameters](#) Transfer
[Message Log](#)
 Batch Timings
[View Log/Trace](#)

View Log/Trace Page

View Log/Trace

Report ID: 2646 Process Instance: 2488699 [Message Log](#)

Name: POY4011 Process Type: Crystal

Run Status: Success

PO Listing By Vendor

Distribution Details

Distribution Node: FDMWEBCR Expiration Date: 04/07/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/31/2006 8:28:07.000000AM PST
POY4011_2488699.PDF	38,286	03/31/2006 8:28:07.000000AM PST
PeopleSoft Trace File	471	03/31/2006 8:28:07.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Example of Report Output

PEOPLESOFT Report ID: POY4011 PeopleSoft Purchasing
User ID: JHARRIS PO LISTING BY VENDOR Page No: 1
Run Control: RUN_POY4011 Run Date: 03/31/2006
Run Time: 8:28:09 AM

PO Dates Included: 01/1/2004 To: 01/31/2004
Vendor Name: STATE
Vendor ID: STATE State: Cascade Office Products

PO ID	Order #	Qty	PO Date	Item	Shipmt		PO Status	Unit	Rate	Currency	Amount
					Y	N					
02380	0000000962	0	03/2004	Production	Y	N	Comp	N	N	USD	41.30
02380	0000000960	3	04/2004	Production	Y	N	Comp	N	N	USD	14.35
02380	0000000960	3	04/2004	Production	Y	N	Comp	N	N	USD	28.48
02380	0000000967	2	04/2004	Production	Y	N	Comp	N	N	USD	8.20
02380	0000000972	2	01/2004	Production	Y	N	Comp	N	N	USD	28.81

PO to Requisition XREF (POY4100)

Report Information

Purpose of the Report

This report provides detailed PO information sorted by buyer.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Requisition/PO Xref

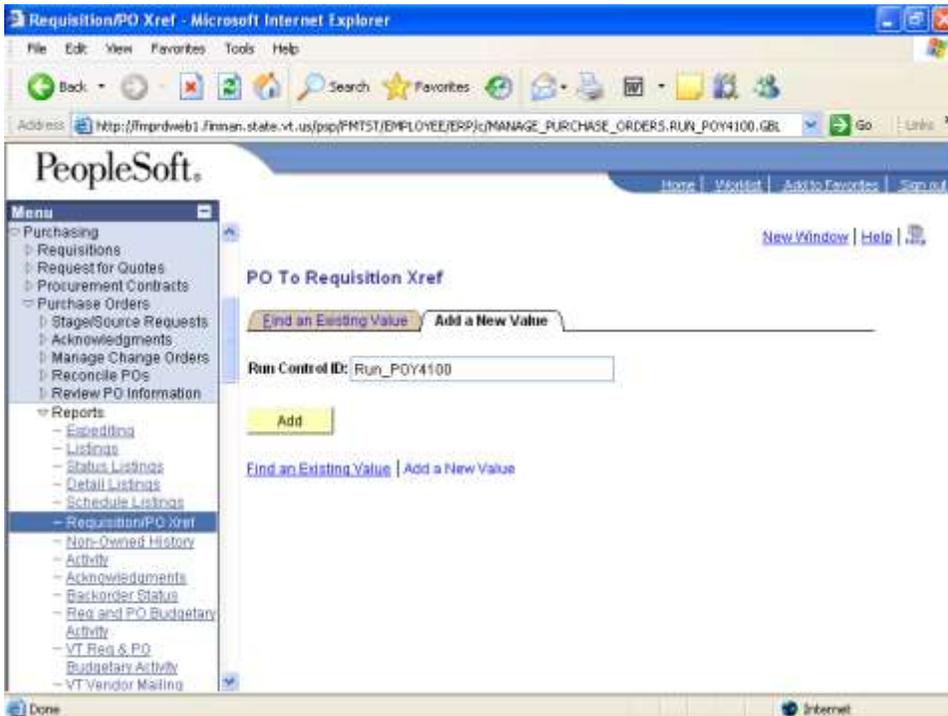
Report Execution Procedure

Run Control Notes:

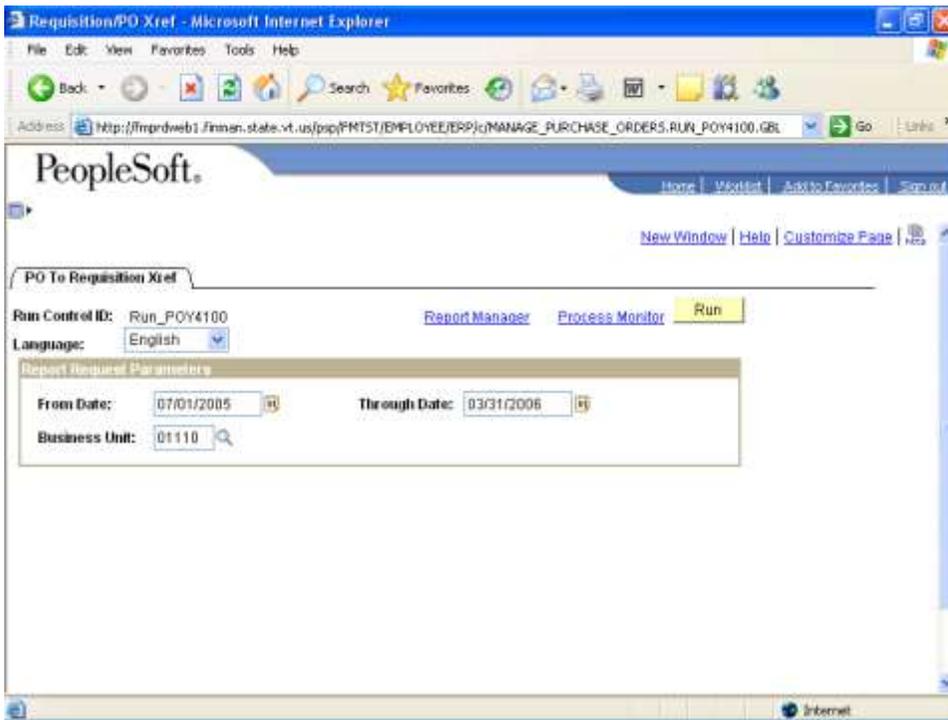
- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY4100)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or use pop-up calendar to select.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or use pop-up calendar to select.	
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> • To view the processing status of the report. • Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY4100-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY4100

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PO to Requisition XREF Report	POY4100	Crystal	Web	PDF	Distribution

Process Monitor Page

Process Monitor

View Process Request For

User ID: Type: Last: Minutes

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488721	Crystal	POY4100-JHARRIS	JHARRIS	03/31/2006 1:34:02PM PST	Success	Posted	Details
<input type="checkbox"/>	2488720	Crystal	POY4032-JHARRIS	JHARRIS	03/31/2006 1:11:09PM PST	Success	Posted	Details

Process Instance: 2488721

Process Detail Page

The screenshot shows the 'Process Detail' page in a Microsoft Internet Explorer browser. The address bar displays the URL: http://fmrdrweb1.fmrn.state.vt.us/psp/fmtst/EMPLOYEE/ERP/c/MPMANAGE_PURCHASE_ORDERS.RUN_POY4100.GBL. The page header includes the PeopleSoft logo and navigation links for Home, Mylist, Add to Favorites, and Sign out.

Process Detail

Process

Instance: 2488721 Type: Crystal
 Name: POY4100- Description: PO to Requisition XREF Report
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: Run_POY4100 Hold Request
 Location: Server Queue Request
 Server: PSNTCR Cancel Request
 Recurrence: Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/31/2006 1:34:46PM PST [Parameters](#) Transfer
 Run Anytime After: 03/31/2006 1:34:02PM PST [Message Log](#)
 Began Process At: 03/31/2006 1:35:13PM PST Batch Timings
 Ended Process At: 03/31/2006 1:35:36PM PST [View Log/Trace](#)

Process Instance: 2488721 Internet

View Log/Trace Page

The screenshot shows the 'View Log/Trace' page in a Microsoft Internet Explorer browser. The address bar displays the same URL as the previous page. The page header includes the PeopleSoft logo and navigation links for Home, Mylist, Add to Favorites, Sign out, New Window, Help, and Customize Page.

View Log/Trace

Report

Report ID: 2659 Process Instance: 2488721 [Message Log](#)
 Name: POY4100- Process Type: Crystal
 Run Status: Success

PO to Requisition XREF Report

Distribution Details

Distribution Node: FDMVEBCR Expiration Date: 04/07/2008

File List

Name	File Size (bytes)	Dateline Created
Message Log	0	03/31/2006 1:35:36.000000PM PST
POY4100- 2488721 PDF	38,126	03/31/2006 1:35:36.000000PM PST
PeopleSoft Trace File	471	03/31/2006 1:35:36.000000PM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488721 Internet

Procurement Budgetary Activity (POS8001)

Report Information

Purpose of the Report

This report provides budgetary amount information for and purchase orders (POs) according to report request parameters.

Type of Report

SQR

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity

Report Execution Procedure

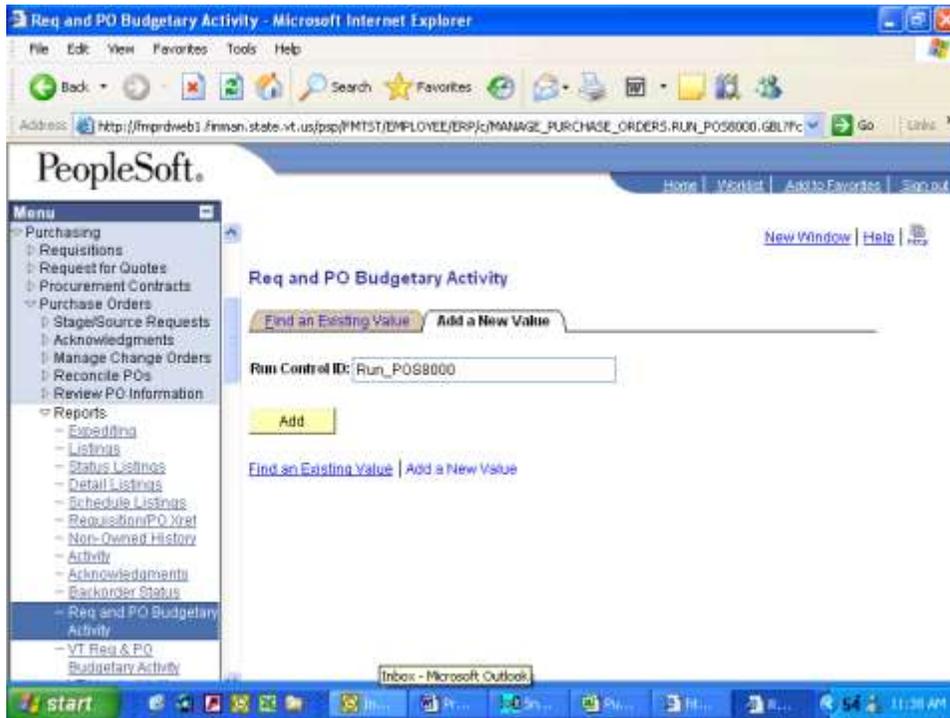
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POS8000)

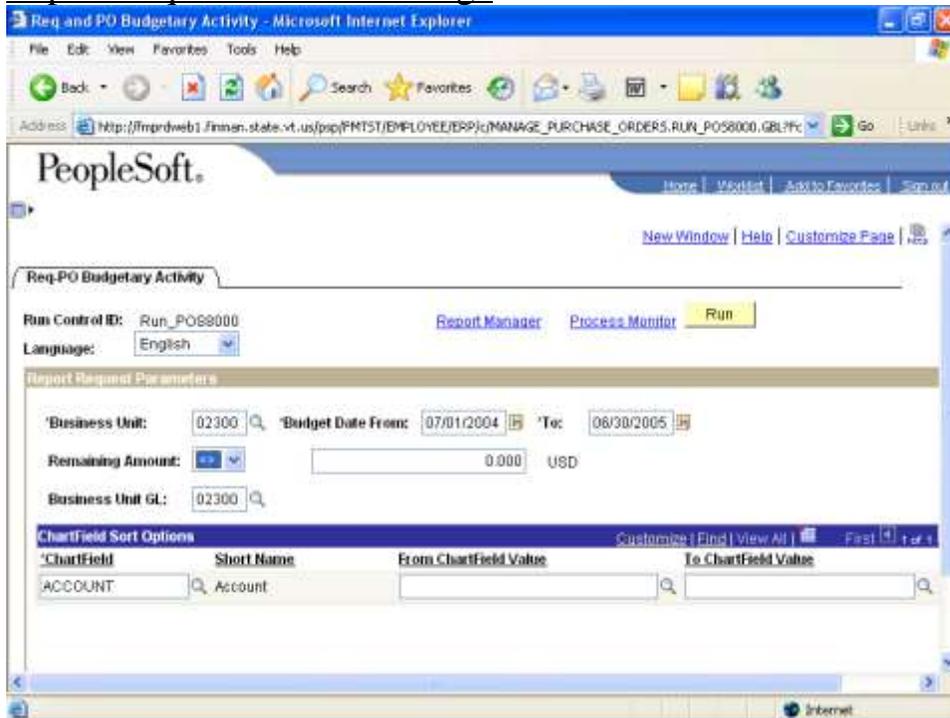
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
*Business Unit	Enter Business Unit or use lookup to select.	An entry in this field is required.
*Budget Date From	Enter desired Budget Date From or use pop-up calendar to select.	An entry in these fields is required. <ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
*Budget Date To	Enter desired Budget Date To or use pop-up calendar to select.	
Remaining Amount (Box 1)	Choose appropriate expression	
Remaining Amount (Box 2)	Enter the desired Remaining Amount	
Business Unit GL	Enter Business Unit GL or use lookup to select.	Leave Field blank to select all Business Unit GL's.
*Chartfield	Enter Chartfield or use lookup to select.	An entry in this field is required. To select more than one Chartfield click the + button at the end of the line.
From Chartfield Value	Enter From Chartfield Value or use lookup to select.	Leave field blank to select values from the beginning
To Chartfield Value	Enter To Chartfield Value or use lookup to select.	Leave field blank to select values to the end

Report Steps		see screenshot below
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
In This Field/ Link	Action	Notes
Server Name	Select “PSUNX”	This is the server for SQR Reports
Process List Select	Select “Procurement Budgetary Activity” line	To select the proper report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POS8001-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POS8000

Server Name: PSUNX Run Date: 03/30/2006
 Recurrence: Run Time: 12:08:01 PM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Procurement Budgetary Activity	POS8001	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Requisition Budgetary Activity	POS8002	SQR Report	Web	PDF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

Process Monitor

User ID: JHARRIS Type: Last: 25 Minutes [Refresh](#)

Server: Name: Instance: to [Save On Refresh](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488669		SQR Report	POS8001	JHARRIS	03/30/2006 12:08:01 PM PST	Success	Posted	Details

Process Instance: 2488669

Process Detail Page

Process Detail

Process

Instance: 2488669 Type: SQR Report
 Name: POS8001 Description: Procurement Budgetary Activity
 Run Status: Success Distribution Status: Posted

Run Update Process

Run Control ID: Run_POS8000
 Location: Server
 Server: PSUNX
 Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time Actions

Request Created On: 03/30/2006 12:10:12PM PST [Parameters](#) Transfer
 Run Anytime After: 03/30/2006 12:08:01PM PST [Message Log](#)
 Began Process At: 03/30/2006 12:10:19PM PST Batch Timings
 Ended Process At: 03/30/2006 12:29:32PM PST [View Log/Trace](#)

Process Instance: 2488669

View Log/Trace Page

View Log/Trace

Report

Report ID: 2623 Process Instance: 2488669 [Message Log](#)
 Name: POS8001 Process Type: SQR Report
 Run Status: Success

Procurement Budgetary Activity

Distribution Details

Distribution Node: FMPRDWEB1 Expiration Date: 04/02/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,532	03/30/2006 12:29:32.000000PM PST
POS8001_2488669.PDF	3,109	03/30/2006 12:29:32.000000PM PST
Trace File	0	03/30/2006 12:29:32.000000PM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488669

Example of Report Output

Report ID: POS8001
Business Unit: 02300
Account: ALL

PeopleSoft Purchasing
PROCUREMENT BUDGETARY ACTIVITY REPORT
Budget Date From 01-JUL-2004 To 30-JUN-2005 Remaining Amount <> 0.00 USD

PO ID	Line/Sched/Dist	Vendor	Original PO Amount	Liquidated Amount	Remaining Amount	Vouchered Amount	Account
000000826	1/1/1	000000119	121.81	0.00	121.81	0.00	521320
000000829	1/1/1	000002356	243.22	0.00	243.22	0.00	520100
000000831	1/1/1	000000983	185.33	0.00	185.33	0.00	516600
000000834	4/1/1	000009031	87.06	0.00	87.06	0.00	522220
000000865	1/1/1	000005932	14.95	0.00	14.95	0.00	520000
000000914	1/1/1	000009304	395.10	0.00	395.10	0.00	513015
000000926	1/1/1	000004244	176.50	0.00	176.50	0.00	517000
000001072	3/1/1	000019835	30.49	0.00	30.49	0.00	520110
000001072	3/1/2	000019835	30.49	0.00	30.49	0.00	512300
Totals:			1,284.95	0.00	1,284.95	0.00	

18.7 x 10.67 in | 1 of 1 | Done | Internet

VT PO Activity Report (VTPO8001)

Report Information

Purpose of the Report

This report lists all active PO's with related info and amounts budgeted, liquidated, vouchered and remaining.

Type of Report

SQR

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > VT PO Budgetary Activity

Navigation (Path) to the Query

Reporting Tools > Query > Query Viewer

Report Execution Procedure

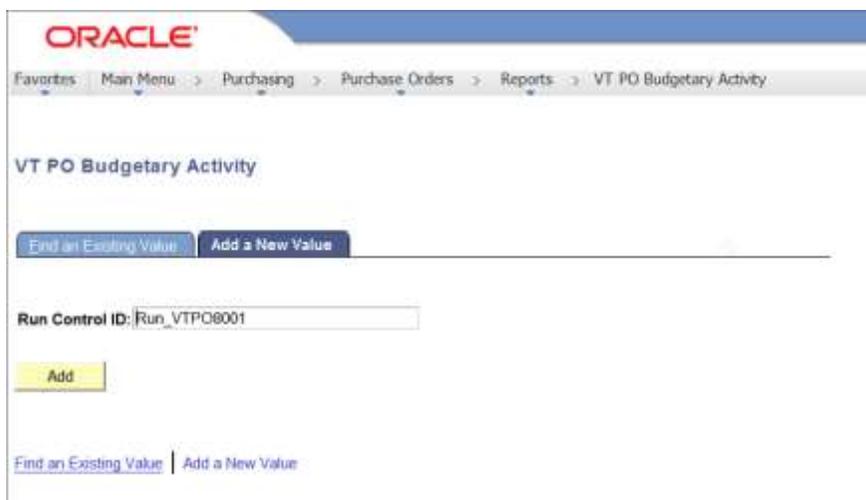
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run regularly, user should select a Run Control ID naming system that can be easily identified (e.g. Run_PO8001)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Business Unit GL	Enter desired Business Unit	Click on magnifying glass to lookup Business Unit
Budget Date From	Enter desired reporting from date	Click on calendar to select date
To	Enter desired reporting to date	Click on calendar to select date
Remaining Amount	Select operator and enter amount	Choose operator from drop down and enter the amount desired
PO Status	Select operator and status	Choose operator and desired PO Status from drop down
Chartfield	Enter Chartfield value to include in the report	Click on magnifying glass to lookup Chartfield
From Chartfield Value	Enter from Chartfield value	Leave blank to include all values
To Chartfield Value	Enter to Chartfield value	Leave blank to include all values
	Click the plus or minus button	Click the plus button if you want to include more than one Chartfield value; click the minus button to delete a Chartfield value selection
	Click the “Run” button	Process Scheduler page loads
Process List	Check the select box for VTPO8001	This should be the default
Type	Accept default	Web
Format	Accept default	SPF
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.

Report Steps		see screenshot below
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”. Note the Process Instance Number
Navigate to Query		
Begins With:	Type “VT_PO8001”	
	Click the Search Button	A list of matching queries loads at the bottom of the page
HTML or Excel	Click the hyperlink	Select either HTML or Excel for the desired output. The query prompt page loads.
Process Instance	Type Process Instance noted from Process Monitor Page	Click on magnifying glass to lookup Process Instance
	Click the View Results Page	The results appear

Run Control ID Page



Report Request Parameters Page

ORACLE

Favorites | Main Menu > Purchasing > Purchase Orders > Reports > VT PO Budgetary Activity

Vt Run Pos001

Run Control ID: Run_VTPO001 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameters

Business Unit GL: 00110 Budget Date From: 07/01/2011 To: 03/12/2012

Remaining Amount: 0.000
PO Status: Canceled

This report will return data meeting either of the criteria specified in this box.

ChartField Sort Options

ChartField	Sort Name	From ChartField Value	To ChartField Value
ACCOUNT	Account		
DEPTID	Dept		
FUND_CODE	Fund		

Run Query VT_PO0001 for VTPO0001 output

Process Scheduler Request Page

ORACLE

Favorites | Main Menu > Purchasing > Purchase Orders > Reports > VT PO Budgetary Activity

Process Scheduler Request

User ID: KJAQUISH Run Control ID: Run_VTPO001

Server Name: Run Date: 03/13/2012
Recurrence: Run Time: 10:57:01AM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	VT Purchasing Budget Activity	VTPO0001	SQR Report	Web	SPF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

ORACLE

Favorites | Main Menu | Purchasing | Purchase Orders | Reports | VT PO Budgetary Activity

Process List | [Server List](#)

View Process Request For

User ID: KJAJQISH Type: Last 1 Days Refresh

Server: Name: Instance: to Save On Refresh

Run Status: Distribution Status: Save On Refresh

Select	Instance	Req. Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5705486	SQR Report	VTPO0001	KJAJQISH	03/13/2012 10:57:01AM EDT	Success	Posted	Details

Do back to VT PO Budgetary Activity

Save Notify

Process List | [Server List](#)

Query Search Page

ORACLE

Favorites | Main Menu | Reporting Tools | Query | Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name begins with VT_PO0001

Search Advanced Search

Search Results

*Folder View: All Folders

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
VT_PO0001	RUN Process First	Public		HTML	Excel	XML	Schedule	Favorite

Query Prompt Page

VT_PO0001 - RUN Process First

Process Instance: 5705486 View Results

Process Instance	Business Unit	Business Unit GL	PO ID	PO Status	Line	Sched Num	Distrib Line Num	DeptID	Class	Proj/Gr	Fund	Account	Budget Date From	Budget Date To	Program	Contract ID	Vendor	Vendor Name	Original PO Amount	Liquid
------------------	---------------	------------------	-------	-----------	------	-----------	------------------	--------	-------	---------	------	---------	------------------	----------------	---------	-------------	--------	-------------	--------------------	--------

Example of Report Output

VT_PO8001 - RUN Process First

Process Instance: 5705486 [View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (318 kb)

[View All](#)

Process Instance	Business Unit	Business Unit GL	PO ID	PO Status	Line	Sched Num	Dist/Re Line Num	DeptID	Class	Prog/Gr	Fund	Account	Budget Date From	Budget Date To	Program	Contract ID	Vendor
1	5705486	08110	000002177	C	1	1	1	811000200			57100	520120	07/01/2011	03/12/2012		0000000000000000000015968	0000289074
2	5705486	08110	000002178	C	1	1	1	811000200			57100	522300	07/01/2011	03/12/2012			000003884
3	5705486	08110	000002179	C	1	1	1	811000200			57100	522300	07/01/2011	03/12/2012			0000011331
4	5705486	08110	000002180	C	1	1	1	811000200			57100	522300	07/01/2011	03/12/2012		0000000000000000000018499	000000083
5	5705486	08110	000002181	C	1	1	1	811000200			57100	522600	07/01/2011	03/12/2012			000001269
6	5705486	08110	000002182	C	1	1	1	811000200			57100	522300	07/01/2011	03/12/2012			000000476
7	5705486	08110	000002183	C	1	1	1	811000200			57100	522600	07/01/2011	03/12/2012		0000000000000000000016110	000001288
8	5705486	08110	000002183	C	2	1	1	811000200			57100	522600	07/01/2011	03/12/2012		0000000000000000000016110	000001289

Requisition Reports

REQ/RFQ Cross Reference (POY6100)

Report Information

Purpose of the Report

This report provides a cross-reference between requests for quotes and the requisitions created from those requests for quotes.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Requests for Quotes > Requisition/RFQ XRef Report

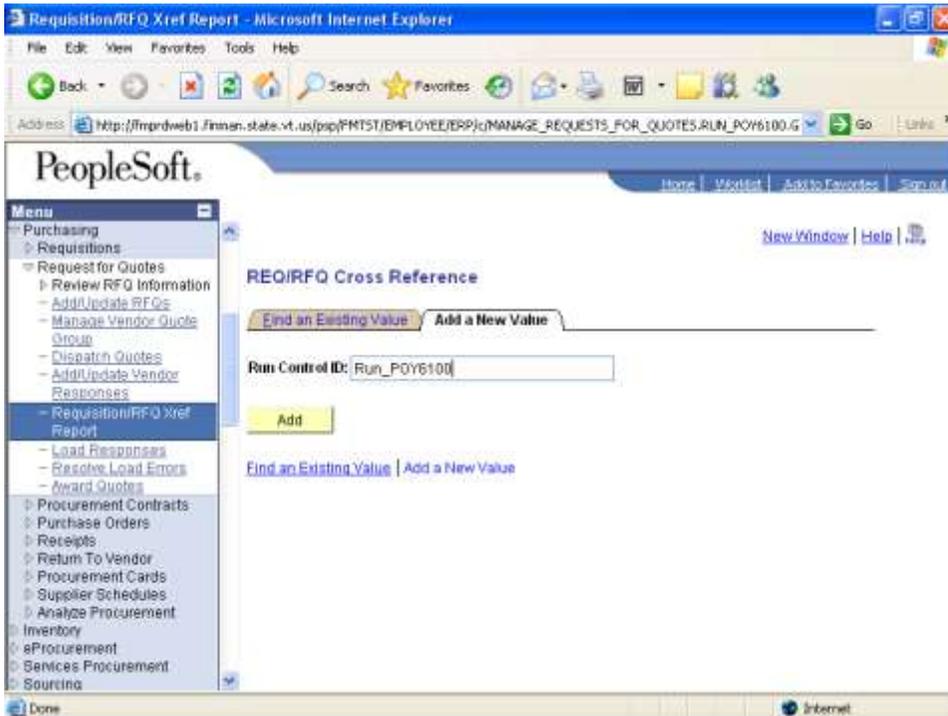
Report Execution Procedure

Run Control Notes:

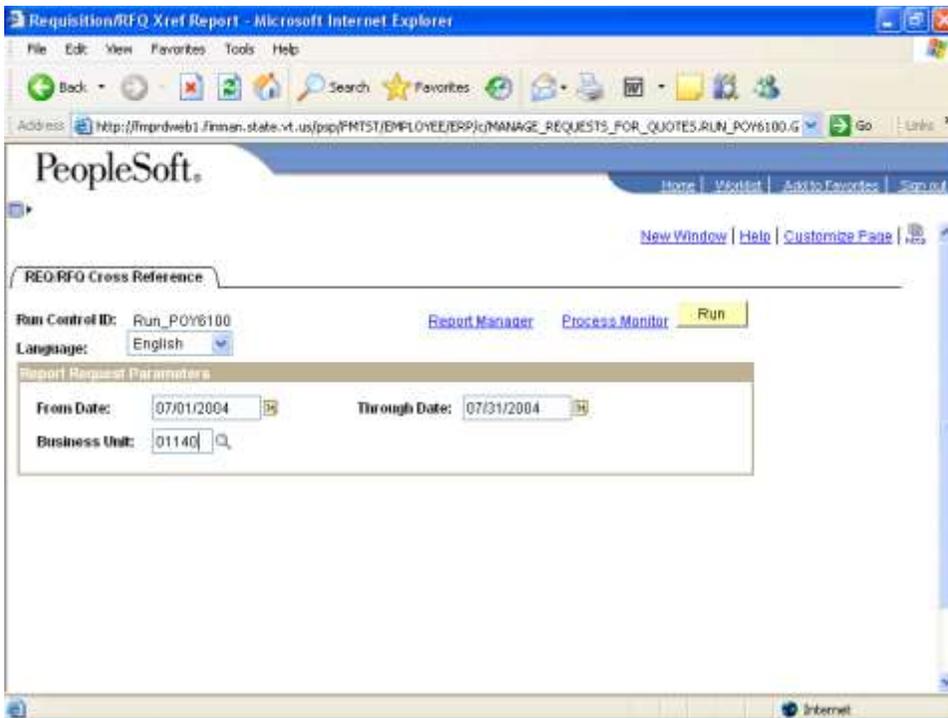
- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY6100)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or select date from pop-up calendar.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or select date from pop-up calendar.	
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> • To view the processing status of the report. • Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY6100-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Requisition/RFQ Xref Report - Microsoft Internet Explorer

Address: http://fmrpdweb1.finnan.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/MANAGE_REQUESTS_FOR_QUOTES.RUN_POY6100.G

PeopleSoft

Home | MyList | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY6100

Server Name: PSMTCR Run Date: 03/31/2006

Recurrence: Run Time: 1:53:17PM [Reset to Current DateTime](#)

Time Zone: [Search]

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	REQ/RFQ Cross Reference Report	POY6100-	Crystal	Web	PDF	Distribution

OK Cancel

Process Monitor Page

Requisition/RFQ Xref Report - Microsoft Internet Explorer

Address: http://fmrpdweb1.finnan.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/MANAGE_REQUESTS_FOR_QUOTES.RUN_POY6100.G

PeopleSoft

Home | MyList | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Process List [Server List](#)

View Process Request For

User ID: JHARRIS Type: Last: 25 Minutes [Refresh](#)

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-2 of 2 | [Last](#)

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488724		Crystal	POY6100-	JHARRIS	03/31/2006 1:53:17PM PST	Success	Posted	Details
<input type="checkbox"/>	2488721		Crystal	POY4100-	JHARRIS	03/31/2006 1:34:02PM PST	Success	Posted	Details

Process Instance: 2488724

Process Detail Page

Process Detail

Process

Instance: 2488724 Type: Crystal
 Name: POY6100- Description: REQIRFG Cross Reference Report
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: Run_POY6100 Hold Request
 Location: Server Queue Request
 Server: PSNTCR Cancel Request
 Recurrence: Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/31/2006 1:53:31PM PST [Parameters](#) Transfer
 Run Anytime After: 03/31/2006 1:53:17PM PST [Message Log](#)
 Began Process At: 03/31/2006 1:53:58PM PST Batch Timings
 Ended Process At: 03/31/2006 1:54:14PM PST [View Log/Trace](#)

Process Instance: 2488724 Internet

View Log/Trace Page

View Log/Trace

Report

Report ID: 2652 Process Instance: 2488724 [Message Log](#)
 Name: POY6100- Process Type: Crystal
 Run Status: Success

REQIRFG Cross Reference Report

Distribution Details

Distribution Node: FDM/AEBCR Expiration Date: 04/07/2006

File List

Name	File Size (bytes)	Datetime Created
Message Log	0	03/31/2006 1:54:14.000000PM PST
POY6100- 2488724.PDF	55,722	03/31/2006 1:54:14.000000PM PST
PeopleSoft Trace File	471	03/31/2006 1:54:14.000000PM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488724 Internet

Example of Report Output

Report ID: POY8100
User ID: JHARRIS
Run Control: Run_POY8100

PeopleSoft Purchasing
RFQ TO REQUISITION XREF REPORT

Page No. 1
Run Date 3/5/2008
Run Time 1:51:58 PM

PO Dates Included: 7/1/2004 Thru: 7/31/2004
Business Unit: D1140

RFQ ID	RFQ Date	Line	Item ID	Description	Order Qty	UOM	Price	Requisition		Quantity	UOM	Vendor ID	Vendor
								ID	Line				
000000030	7/9/2004	15	3000000000005001	VERMONT INCOME TAX BOOKLET (SEE ITEM SPECS ATTACHED)	260.00	T	408.18	0000000045	1	260.00	T	0000001020	OFFSETHOUS-001
				VERMONT INCOME TAX BOOKLET (SEE ITEM SPECS ATTACHED)	260.00	T	408.18	0000000045	1	260.00	T	0000019659	DODGEGRAPH-001
				VERMONT INCOME TAX BOOKLET (SEE ITEM SPECS ATTACHED)	260.00	T	408.18	0000000045	1	260.00	T	0000061573	SALTUSPRE3-001
				VERMONT INCOME TAX BOOKLET (SEE ITEM SPECS ATTACHED)	260.00	T	408.18	0000000045	1	260.00	T	0000065318	BRADFORD&B-001
		15		POSTCARD WITH "NOTICE TO TAXPAYERS NOT RECEIVING A BOOKLET". A 5 PT. 4 1/4" X 6"	200.00	T	12.50	0000000045	2	200.00	T	0000001020	OFFSETHOUS-001
				POSTCARD PRINTED ON BOTH SIDES IN BLACK AND RED INK. POSTCARD WITH "NOTICE TO TAXPAYERS NOT RECEIVING A BOOKLET". A 5 PT. 4 1/4" X 6"	200.00	T	12.50	0000000045	2	200.00	T	0000019659	DODGEGRAPH-001
				POSTCARD WITH "NOTICE TO TAXPAYERS NOT RECEIVING A BOOKLET". A 5 PT. 4 1/4" X 6"	200.00	T	12.50	0000000045	2	200.00	T	0000061573	SALTUSPRE3-001

11 x 8.5 in | 1 of 10 | Done | Internet

Requisition Budgetary Activity (POS8002)

Report Information

Purpose of the Report

This report provides budgetary amount information for requisitions according to report request parameters.

Type of Report

SQR

Navigation (Path) to the Report

Purchasing > Purchase Orders > Reports > Req and PO Budgetary Activity

Report Execution Procedure

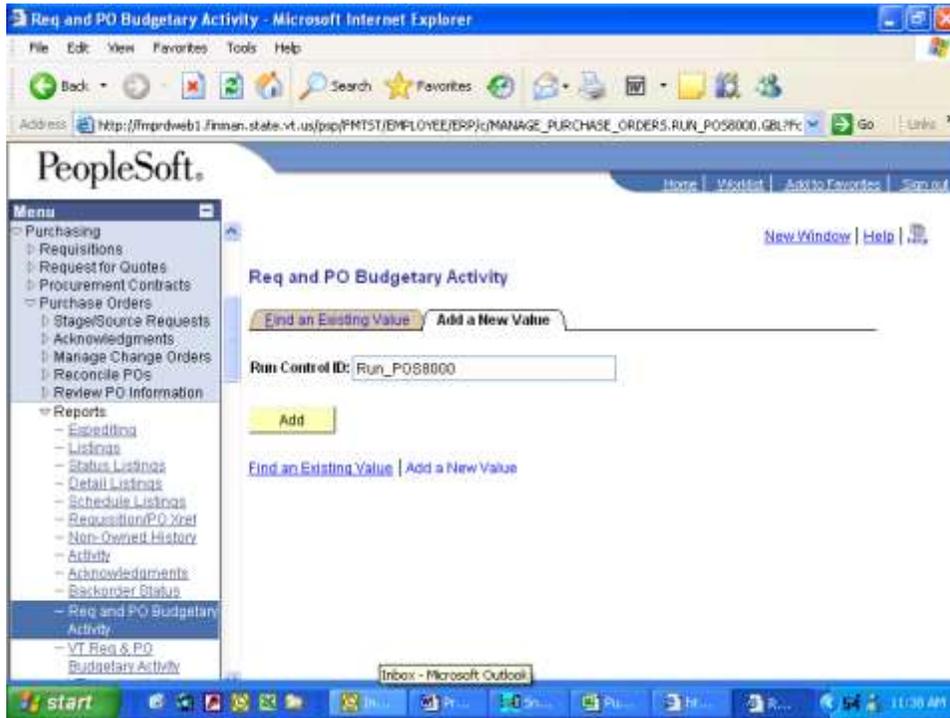
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POS8000)

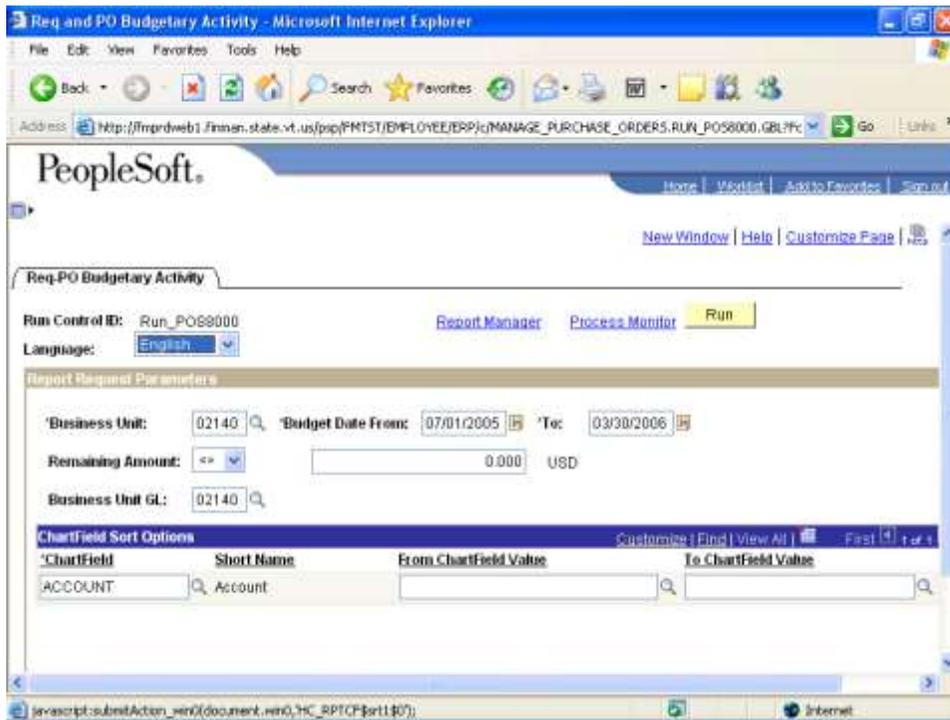
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
*Business Unit	Enter Business Unit or use lookup to select.	An entry in this field is required.
*Budget Date From	Enter desired Budget Date From or use pop-up calendar to select.	Entry in these fields is required. <ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
*Budget Date To	Enter desired Budget Date To or use pop-up calendar to select.	
Remaining Amount (Box 1)	Choose appropriate expression	
Remaining Amount (Box 2)	Enter the desired Remaining Amount	
Business Unit GL	Enter Business Unit GL or use lookup to select.	Leave Field blank to select all Business Unit GL's.
*Chartfield	Enter Chartfield or use lookup to select.	An entry in this field is required. To select more than one Chartfield click the + button at the end of the line.
From Chartfield Value	Enter From Chartfield Value or use lookup to select.	Leave field blank to select values from the beginning
To Chartfield Value	Enter To Chartfield Value or use lookup to select.	Leave field blank to select values to the end
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSUNX”	This is the server for SQR Reports

Report Steps		see screenshot below
In This Field/ <u>Link</u>	Action	Notes
Process List Select	Select “Requisition Budgetary Activity” line	To select the proper report.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
<u>Process Monitor</u>	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
<u>Details</u>	Click the Details link	Opens the Process Detail page.
<u>View Log/Trace</u>	Click the View Log/Trace link	Opens the View Log/Trace page.
<u>POS8002-#####.PDF</u>	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POS8000

Server Name: PSUNX Run Date: 03/30/2006
 Recurrence: Run Time: 1:46:15PM [Reset to Current DateTime](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Procurement Budgetary Activity	POS8001	SQR Report	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Requisition Budgetary Activity	POS8002	SQR Report	Web	PDF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

Process List [Server List](#)

View Process Request For

User ID: JHARRIS Type: Last: 25 Minutes [Refresh](#)
 Server: Name: Instance: to [Save On Refresh](#)
 Run Status: Distribution Status:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488690		SQR Report	POS8002	JHARRIS	03/30/2006 1:41:25PM PST	Success	Posted	Details
<input type="checkbox"/>	2488689		SQR Report	POS8002	JHARRIS	03/30/2006 1:37:55PM PST	Success	Posted	Details
<input type="checkbox"/>	2488688		SQR Report	POS8002	JHARRIS	03/30/2006 1:30:43PM PST	Success	Posted	Details
<input type="checkbox"/>	2488686		SQR Report	POS8002	JHARRIS	03/30/2006 1:27:46PM PST	Success	Posted	Details

Process Detail Page

Process Detail

Process

Instance: 2488690 Type: SQR Report
 Name: POS8002 Description: Requisition Budgetary Activity
 Run Status: Success Distribution Status: Posted

Run [Update Process](#)

Run Control ID: Run_POS8000 Hold Request
 Location: Server Queue Request
 Server: PSUNX Cancel Request
 Recurrence: Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/30/2006 1:41:29PM PST [Parameters](#) Transfer
 Run Anytime After: 03/30/2006 1:41:25PM PST [Message Log](#)
 Began Process At: 03/30/2006 1:41:36PM PST Batch Timings
 Ended Process At: 03/30/2006 1:43:29PM PST [View Log/Trace](#)

Process Instance: 2488690

View Log/Trace Page

View Log/Trace

Report

Report ID: 2638 Process Instance: 2488690 [Message Log](#)
 Name: POS8002 Process Type: SQR Report
 Run Status: Success

Requisition Budgetary Activity

Distribution Details

Distribution Node: FMPDW1 Expiration Date: 04/02/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,532	03/30/2006 1:43:29.000000PM PST
pos8002_2488690.PDF	3,369	03/30/2006 1:43:29.000000PM PST
Trace File	0	03/30/2006 1:43:29.000000PM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488690

Example of Report Output

Report ID: POS8002
Business Unit: 02140
Account: ALL

PeopleSoft Purchasing
REQUISITION BUDGETARY ACTIVITY REPORT

Budget Date From 01-JUL-2005 To 30-MAR-2006 Remaining Amount <> 0.00

REQ ID	Line/Sched/Dist	Original REQ Amount	Liquidated Amount	Remaining Amount	PO Amount	Account
0000000207	1/1/1	1.00	0.00	1.00	0.00	507600
000000209	1/1/1	57,794.00	0.00	57,794.00	0.00	522350
000000210	1/1/1	41,596.00	30,806.06	11,183.94	0.00	522210
000000210	2/1/1	3,400.00	2,494.42	905.58	0.00	522210
000000210	3/1/1	139.00	94.38	35.62	0.00	522210
000000210	4/1/1	700.00	513.56	186.44	0.00	522210
000000211	1/1/1	23,500.00	0.00	23,500.00	0.00	522440
000000212	1/1/1	60,000.00	0.00	60,000.00	0.00	522400
000000213	1/1/1	8,252.00	0.00	8,252.00	0.00	522400
000000213	2/1/1	8,450.00	0.00	8,450.00	0.00	522400
Totals:		204,217.00	33,908.42	170,308.58	0.00	

18.7 x 10.67 in | 1 of 1 | Done | Internet

Requisition Print (PORQ010)

Report Information

Purpose of the Report

This report provides a hard copy of your requisitions sorted by requisition ID.

You can print a single requisition or multiple requisitions.

Type of Report

SQR

Navigation (Path) to the Report

Purchasing > Requisitions > Reports > Print Requisition

Report Execution Procedure

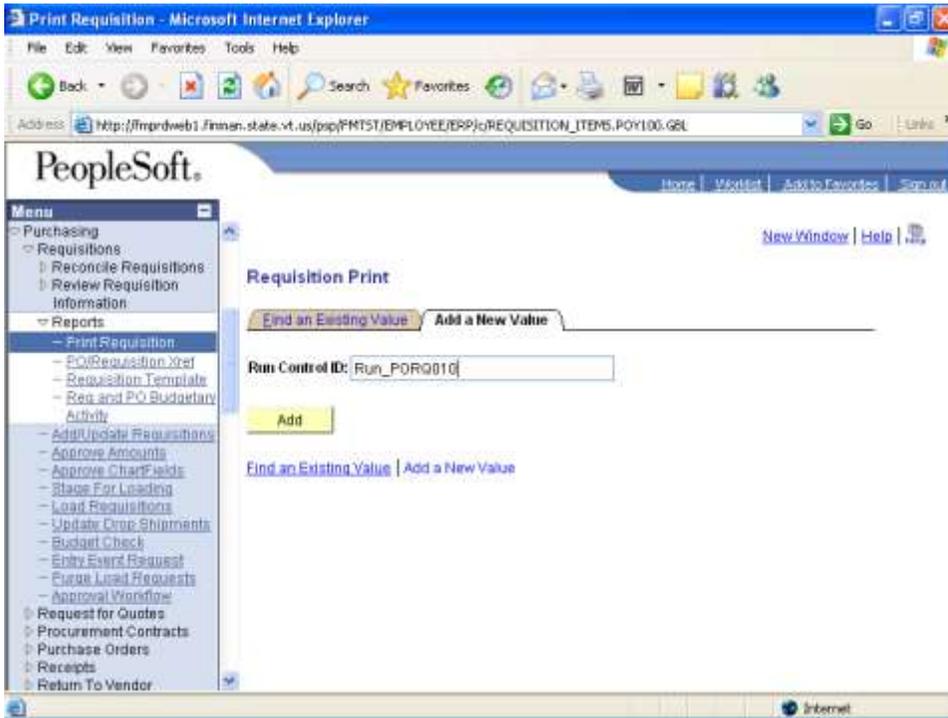
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_PORQ010)

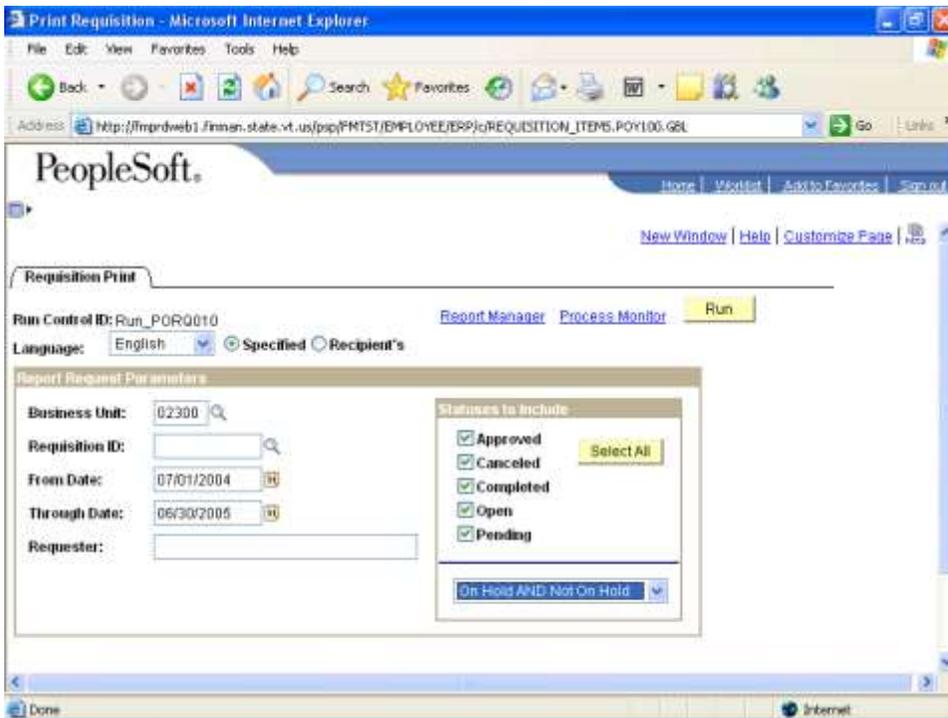
Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
Requisition ID	Enter Requisition or use lookup to select.	Leave field blank to select all Requisitions
From Date	Enter From Date or use pop-up calendar to select.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or use pop-up calendar to select.	
Requester	Enter Requester	
Statuses To Include	Check the appropriate Statuses to include and select whether you want Requisitions on hold or not.	Check at least one status, however, you can select more than one.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSUNX”	This is the server for SQR Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.

Report Steps		see screenshot below
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
In This Field/ <u>Link</u>	Action	Notes
<u>Process Monitor</u>	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
<u>Details</u>	Click the Details link	Opens the Process Detail page.
<u>View Log/Trace</u>	Click the View Log/Trace link	Opens the View Log/Trace page.
<u>PORQ010-#####.PDF</u>	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Print Requisition - Microsoft Internet Explorer

Address: http://fmrpdweb1.finnan.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/REQUISITION_ITEMS.P0Y100.GBL

PeopleSoft

Home | Mylist | Add to Favorites | Sign out

New Window | Help | Customize Page | MSN

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POR010

Server Name: PSLW Run Date: 03/30/2006

Recurrence: Run Time: 10:52:19AM [Reset to Current DateTime](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	POR010	SQR Report	Web	PDF	Distribution

OK Cancel

Process Monitor Page

Print Requisition - Microsoft Internet Explorer

Address: http://fmrpdweb1.finnan.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/REQUISITION_ITEMS.P0Y100.GBL

PeopleSoft

Home | Mylist | Add to Favorites | Sign out

New Window | Help | Customize Page | Saved

Process List

Server List

View Process Request For

User ID: JHARRIS Type: Last: 15 Minutes [Refresh](#)

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488658		SQR Report	POR010	JHARRIS	03/30/2006 10:52:19AM PST	Success	Posted	Details

Process Instance: 2488658 Internet

Process Detail Page

Process Detail

Process

Instance: 2488658 Type: SQR Report
 Name: PORQ010 Description: Requisition Print SQR
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: Run_PORQ010 Hold Request
 Location: Server Queue Request
 Server: PSUNX Cancel Request
 Recurrence: Delete Request
 Restart Request

Data/Time **Actions**

Request Created On: 03/30/2006 10:53:01AM PST [Parameters](#) Transfer
 Run Runtime After: 03/30/2006 10:52:19AM PST [Message Log](#)
 Began Process At: 03/30/2006 10:53:09AM PST Batch Timings
 Ended Process At: 03/30/2006 10:53:15AM PST [View Log/Trace](#)

Process Instance: 2488658 Internet

View Log/Trace Page

View Log/Trace

Report

Report ID: 2616 Process Instance: 2488658 [Message Log](#)
 Name: PORQ010 Process Type: SQR Report
 Run Status: Success

Requisition Print SQR

Distribution Details

Distribution Node: FMPRDWEB1 Expiration Date: 04/02/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,532	03/30/2006 10:53:15.000000AM PST
porq010_2488658.PDF	5,226	03/30/2006 10:53:15.000000AM PST
Trace File	63	03/30/2006 10:53:15.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2488658 Internet

Example of Report Output

Requisition

Ship To: Department of Liquor Control
Green Mountain Dr. Drawer 20
Montpelier VT 05620-4501

Business Unit:	02300	COMPLETE
Req ID:	000000021	Date: 07/02/2004 Page: 1
Requester	Product ion	Currency: USD
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1		Model 2005 year 54,000-lb. Tandem axel Box Truck		1.0000	EA	65,000.00	65,000.00	07/23/2004

Buyer: Production

Line Total: 65,000.00

Total Requisition Amount: 65,000.00

Model 2005 year 54,000-lb. Tandem axel Box Truck: 300 HP minimum diesel engine: Exhaust Brake: 8-Soeed

8.5 x 11 in | 1 of 2 | Done | Internet

Requisition to PO XREF (POY1100)

Report Information

Purpose of the Report

This report provides information about selected requisitions and the POs that have been created from them.

Type of Report

Crystal

Navigation (Path) to the Report

Purchasing > Requisitions > Reports > PO/Requisition Xref

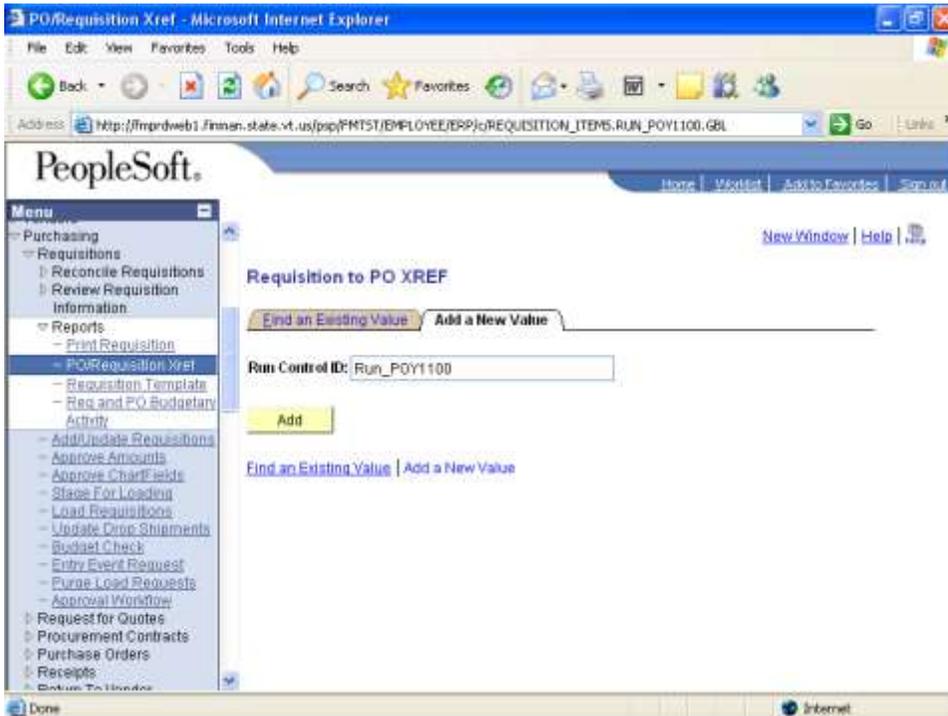
Report Execution Procedure

Run Control Notes:

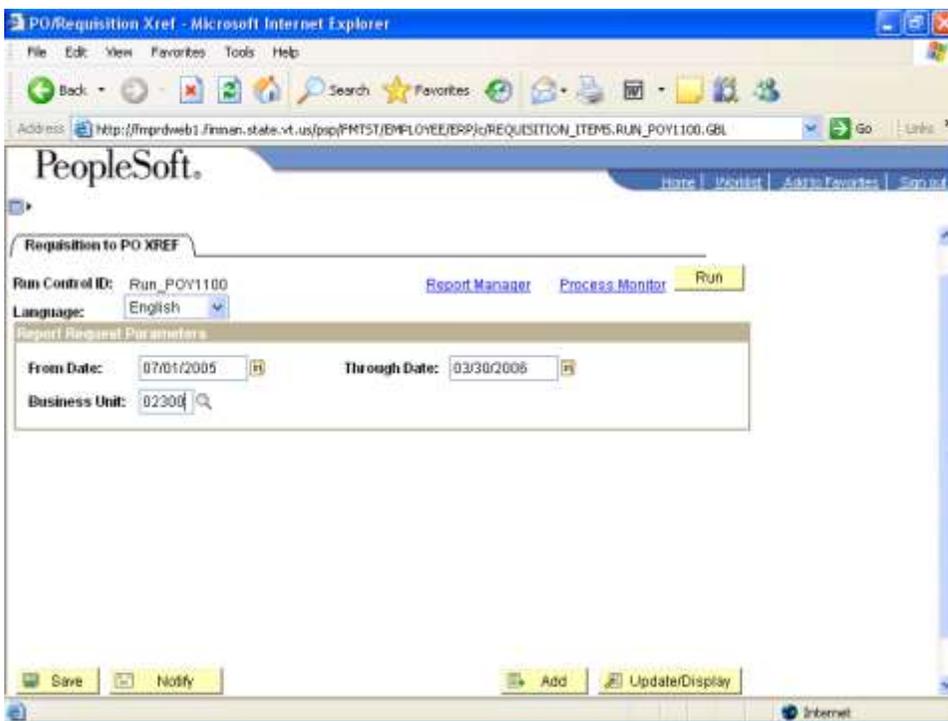
- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_POY1100)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
From Date	Enter From Date or select from the pop-up calendar.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or select from the pop-up calendar.	
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business Units.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Server Name	Select “PSNTCR”	This is the server for Crystal Reports.
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> • To view the processing status of the report. • Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
POY1100-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

PO/Requisition Xref - Microsoft Internet Explorer

Address: http://fmrpdweb1.finnan.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/REQUISITION_ITEMS.RUN_POY1100.GBL

PeopleSoft

Home | Register | Address Favorites | Sign out

New Window | Help | Customize Page |

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_POY1100

Server Name: PSMTCR Run Date: 03/30/2006

Recurrence: Run Time: 2:06:13PM [Reset to Current DateTime](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Requisition to PO.XREF Report	POY1100	Crystal	Web	PDF	Distribution

OK Cancel

Process Monitor Page

PO/Requisition Xref - Microsoft Internet Explorer

Address: http://fmrpdweb1.finnan.state.vt.us/psp/FMTST/EMPLOYEE/ERP/c/REQUISITION_ITEMS.RUN_POY1100.GBL

PeopleSoft

Home | Register | Address Favorites | Sign out

New Window | Help | Customize Page |

Process List

Server List

View Process Request For

User ID: JHARRIS Type: Last: 25 Minutes Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2488691		Crystal	POY1100-JHARRIS		03/30/2006 2:06:13PM PST	Success	Posted	Details

Process Instance: 2488691

Process Detail Page

Process Detail

Process

Instance: 2488691 Type: Crystal
 Name: POY1100 Description: Requisition to PO XREF Report
 Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: Run_POY1100 Hold Request
 Location: Server Queue Request
 Server: PSNTCR Cancel Request
 Recurrence: Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/30/2006 2:08:49PM PST [Parameters](#) Transfer
 Run Anytime After: 03/30/2006 2:06:13PM PST [Message Log](#)
 Began Process At: 03/30/2006 2:09:16PM PST Batch Timings
 Ended Process At: 03/30/2006 2:09:40PM PST [View Log/Trace](#)

Process Instance: 2488691

View Log/Trace Page

View Log/Trace

Report

Report ID: 4693 Process Instance: 2490739 [Message Log](#)
 Name: APY0000 Process Type: Crystal
 Run Status: Success

List of Origins

Distribution Details

Distribution Node: FMWEBCR Expiration Date: 04/04/2008

File List

Name	File Size (bytes)	Datetime Created
APY0000_2490739.PDF	40,120	03/28/2006 11:36:39.000000AM PST
Message Log	0	03/28/2006 11:36:39.000000AM PST
PeopleSoft Trace File	471	03/28/2006 11:36:39.000000AM PST

Distribute To

Distribution ID Type	Distribution ID
User	JHARRIS

Process Instance: 2490739

Example of Report Output

The screenshot shows a Microsoft Internet Explorer browser window displaying a PDF report. The address bar shows the URL: http://fmprdweb1.finman.state.vt.us/psreports/FMTST/2639/POY1100-_2488691.PDF. The browser interface includes a menu bar (File, Edit, View, Favorites, Tools, Help), a toolbar with navigation and utility icons, and a status bar at the bottom showing 'Done' and 'Internet'.

The PDF report content includes a header with the 'PEOPLESoft' logo, report metadata, and a table of requisition and purchase order data.

Report Metadata:

Report ID:	POY1100	PeopleSoft Purchasing	Page No.	1
User ID:	JHARRIS	REQUISITION TO PO XREF REPORT	Run Date	3/30/2006
Run Control:	Run_POY1100		Run Time	2:07:16 PM

Report Parameters:

Req Dates Included: 7/1/2005 Thru: 3/30/2006
Business Unit: 02300

Table Data:

Requisition						Purchase Order								
ID	Lin/Sch/Det	Date	Item ID	Description	Quantity	UOM	PO ID	Contract ID	Rel	Ship Date	Lin/Sch/Det	Quantity	CUR	Price
0000000024	1 1 1	7/11/2005		SINGLE PLY THERMAL PAPER ROLLS	6,000.00	RL	000001185			7/25/2005	1 1 1	6,000.00	USD	1.00

The status bar at the bottom of the browser window shows '1 of 1' and a zoom level of 70%.

RFQ Dispatch/Print (PORFQ01)

Report Information

Purpose of the Report

This report provides a hard copy of the request for quote.

Type of Report

SQR

Navigation (Path) to the Report

Purchasing > Request for Quotes > Dispatch Quotes

Report Execution Procedure

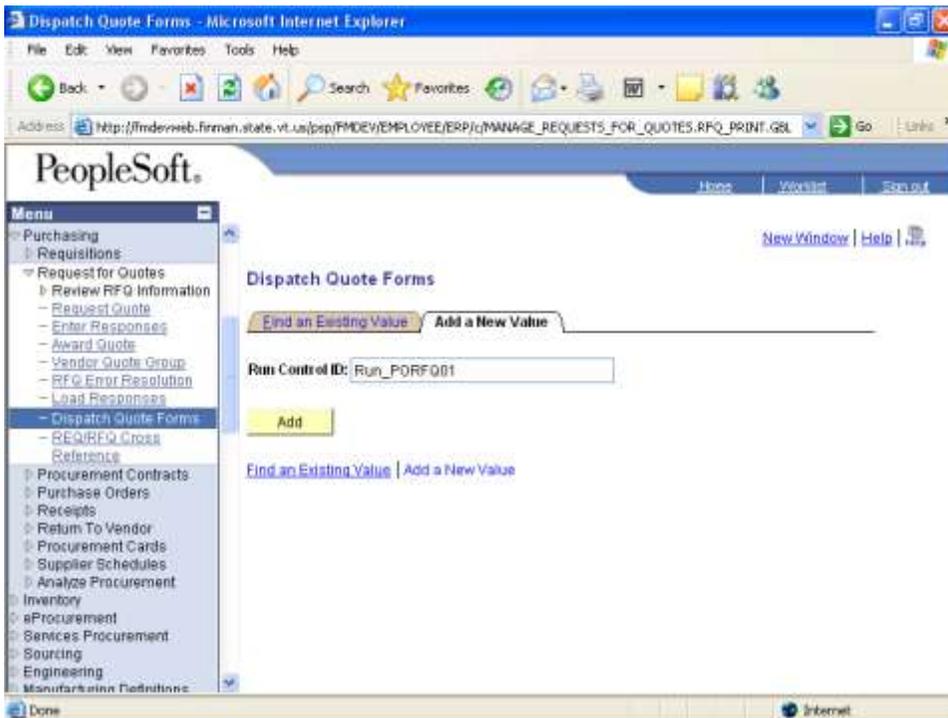
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run on a regular basis, user should select a Run Control ID naming convention that can be easily identified (e.g. Run_PORFQ01)

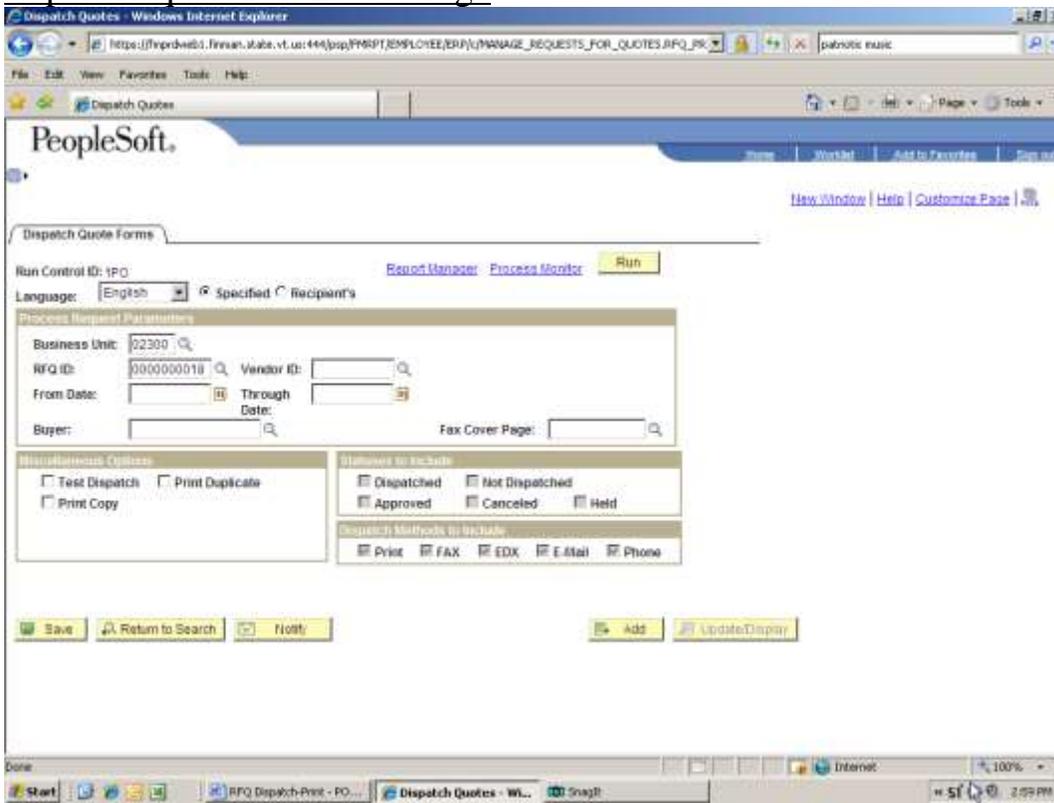
Report Steps		see screenshot below
In This Field/Link	Action	Notes
Business Unit	Enter Business Unit or use lookup to select.	Leave field blank to select all Business units.
RFQ ID	Enter RFQ ID or use lookup to select.	Leave field blank to select all RFQs.
Vendor ID	Enter Vendor ID or use lookup to select.	Leave field blank to select all Vendors
From Date	Enter From Date or use pop-up calendar to select.	<ul style="list-style-type: none"> • to display one day - enter same date in both fields • to display a date range – enter beginning and end date • to display year to date – enter 07/01/YYYY and current date
Through Date	Enter Through Date or use pop-up calendar to select.	
Buyer	Enter Buyer or use lookup to select.	Leave field blank to select all Buyers.
Fax Cover Page	Enter Fax Cover Page or use lookup to select.	Leave field blank to select all Fax Cover Pages.
Miscellaneous Options	Select desired Miscellaneous Options	Select none, all or some of the options.
Statuses to Include	Select desired Statuses	Select none, all or some of the options.
Dispatch Methods to Include	Select desired Dispatch Methods	Select none, all or some of the options.
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Select Box	Click the box for the “PORFQ01” Process	
Server Name	Select “PSUNX”	This is the server for SQR Reports
Type	Choose desired value	Web is recommended, but you may also choose to have report printed, emailed, or saved to file.

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Format	Choose desired value	PDF is recommended.
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”.
Details	Click the Details link	Opens the Process Detail page.
View Log/Trace	Click the View Log/Trace link	Opens the View Log/Trace page.
PORFQ01-#####.PDF	Click this link for the PDF file	This opens the report.

Run Control ID Page



Report Request Parameters Page



Process Scheduler Request Page

Process Scheduler Request

User ID: JHARRIS Run Control ID: Run_PORF001

Server Name: PSUNX Run Date: 03/29/2006
 Recurrence: Run Time: 3:27:27PM [Reset to Current DateTime](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	RFQ Dispatch/Print	PORF001	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Email	PO_RFQ_EMAIL	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	RFQ dispatch & E-mail	RFQDISP	PSJob	(None)	(None)	Distribution

OK Cancel

Process Monitor Page

Process List [Server List](#)

View Process Request For

User ID: JHARRIS Type: Last: 15 Minutes [Refresh](#)

Server: Name: Instance: to [Save On Refresh](#)

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2490958		SQR Report	PORF001	JHARRIS	03/29/2006 3:27:27PM PST	Success	Posted	Details

Process Detail Page

Process Detail

Process

Instance: 2490958 Type: SQR Report
 Name: PORFQ01 Description: RFQ DispatchPrint
 Run Status: Success Distribution Status: Posted

Run Update Process

Run Control ID: Run_PORFQ01
 Location: Server
 Server: PSUNX
 Recurrence:

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time Actions

Request Created On: 03/29/2006 3:27:38PM PST [Parameters](#) Transfer
 Run Runtime After: 03/29/2006 3:27:27PM PST [Message Log](#)
 Began Process At: 03/29/2006 3:27:47PM PST Batch Timings
 Ended Process At: 03/29/2006 3:27:50PM PST [View Log/Trace](#)

Process Instance: 2490958

View Log/Trace Page

View Log/Trace

Report

Report ID: 4907 Process Instance: 2490958 [Message Log](#)
 Name: PORFQ01 Process Type: SQR Report
 Run Status: Success

RFQ DispatchPrint

Distribution Details

Distribution Node: FMFROWEB1 Expiration Date: 04/05/2006

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,589	03/29/2006 3:27:50.000000PM PST
porf01_2490958.PDF	24,531	03/29/2006 3:27:50.000000PM PST
Trace File	498	03/29/2006 3:27:50.000000PM PST

Distribute To

Distribution ID Type: User Distribution ID: JHARRIS

Process Instance: 2490958

Example of Report Output

http://fmdevweb.finman.state.vt.us/psreports/FMDEV/4907/porfq01_2490958.PDF - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address http://fmdevweb.finman.state.vt.us/psreports/FMDEV/4907/porfq01_2490958.PDF Go Links

93% Select Text Create an Adobe PDF online

Request for Quotation

State of Vermont

Return Bid To:
Dept of Buildings & General Svcs
Purchasing & Contrac Administration
Drawer 33
1078 US Rte 2 - Middlesex
Montpelier VT 05633-7601
United States



Request Quote ID.	Date	Buyer	Page
02300-0000000018	07/02/2004	SMITH2	1

Payment Terms	Date Quote Open	Closing
Net_30	07/19/2004	08/02/2004 15:00:00

Vendor: 0000000024
Clark's Truck Center
6 Orr Road
Jericho VT 05465

Ship To: Department of Liquor Control
Green Mountain Dr Drawer 20
Montpelier VT 05620-4501
United States

Line	Item	Description	Quantity	UOM	Unit Price	Extended Amount
1		Model 2005 year 54,000-lb. Tandem axel Box Truck	1.0000	EA		

Freight Terms: FOBDEST **Ship Via:** BESTWAY

Model 2005 year 54,000-lb. Tandem axel Box Truck;
300 HP minimum diesel engine;

8.5 x 11 in 1 of 8

Done Internet

VT Req Activity Report (VTPO8002)

Report Information

Purpose of the Report

This report lists all active Req's with related info and amounts budgeted, liquidated, purchased and remaining.

Type of Report

SQR

Navigation (Path) to the Report

Purchasing > Requisitions > Reports > VT Req Budgetary Activity

Navigation (Path) to the Query

Reporting Tools > Query > Query Viewer

Report Execution Procedure

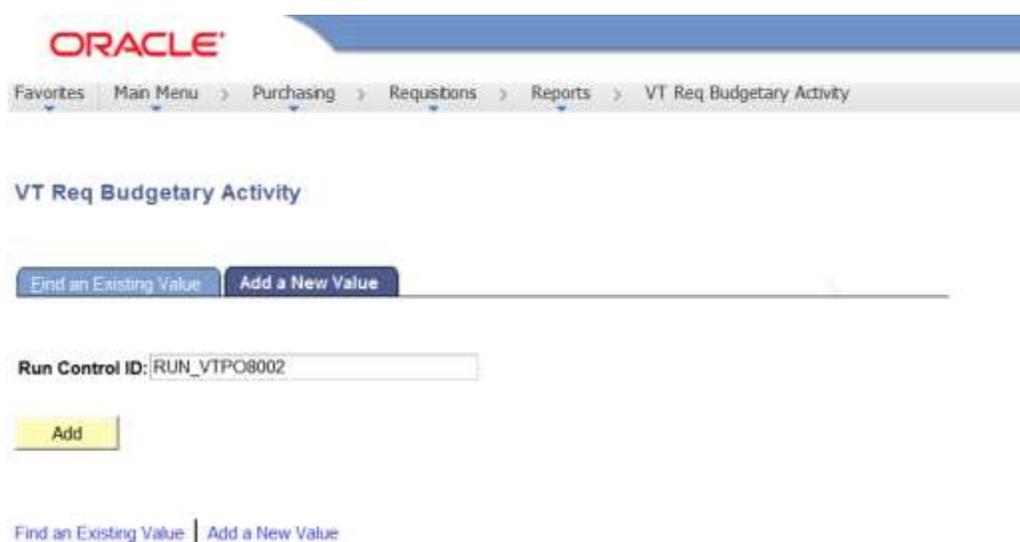
Run Control Notes:

- Select an existing Run Control ID or add a new one.
- For Reports that are run regularly, user should select a Run Control ID naming system that can be easily identified (e.g. Run_VTPO8002)

Report Steps		see screenshot below
In This Field/ Link	Action	Notes
Business Unit GL	Enter desired Business Unit	Click on magnifying glass to lookup Business Unit
Budget Date From	Enter desired reporting from date	Click on calendar to select date
To	Enter desired reporting to date	Click on calendar to select date
Remaining Amount	Select operator and enter amount	Choose operator from drop down and enter the amount desired
Req Status	Select operator and status	Choose operator and desired Requisition Status from drop down
Chartfield	Enter Chartfield value to include in the report	Click on magnifying glass to lookup Chartfield
From Chartfield Value	Enter from Chartfield value	Leave blank to include all values
	Click the plus or minus button	Click the plus button if you want to include more than one Chartfield value; click the minus button to delete a Chartfield value selection
	Click the “Run” button	Process Scheduler page loads. List of Origins report should be selected.
Process List	Check the select box for VTPO8002	This should be the default
Type	Accept default	Web
Format	Accept default	SPF
	Click the “Ok” button	This runs the report and returns you to the Report Request Parameters page.

Report Steps		see screenshot below
Process Monitor	Click the Process Monitor link	<ul style="list-style-type: none"> To view the processing status of the report. Click refresh until the Run Status displays “success” and the Distribution Status displays “posted”. Note the Process Instance Number
Navigate to Query		
Begins With:	Type “VT_PO8002”	
	Click the Search Button	A list of matching queries loads at the bottom of the page
HTML or Excel	Click the hyperlink	Select either HTML or Excel for the desired output. The query prompt page loads.
Process Instance	Type Process Instance noted from Process Monitor Page	Click on magnifying glass to lookup Process Instance
	Click the View Results Page	The results appear

Run Control ID Page



ORACLE

Favorites Main Menu > Purchasing > Requisitions > Reports > VT Req Budgetary Activity

VT Req Budgetary Activity

Find an Existing Value Add a New Value

Run Control ID: RUN_VTPO8002

Add

Find an Existing Value | Add a New Value

Report Request Parameters Page

ORACLE

Favorites | Main Menu > Purchasing > Requisitions > Reports > VT Req Budgetary Activity

Vt Run Pos002

Run Control ID: RUN_VTPO8002 [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Request Parameters

Business Unit GL: 08110 *Budget Date From: 07/01/2011 *To: 03/12/2012

Remaining Amount: > 0.000 This report will return data meeting either of the criteria specified in this box.

REQ Status: < Canceled

ChartField Sort Options

ChartField	Short Name	From ChartField Value	To ChartField Value
ACCOUNT	Account		
DEPTID	Dept		
FUND_CODE	Fund		

Run Query VT_PO0002 for VTPO8002 output

Process Scheduler Request Page

ORACLE

Favorites | Main Menu > Purchasing > Requisitions > Reports > VT Req Budgetary Activity

Process Scheduler Request

User ID: KJACURSH Run Control ID: RUN_VTPO8002

Server Name: Run Date: 03/13/2012

Recurrence: Run Time: 2:23:29PM [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	VT Requisition Budget Activity	VTPO8002	SQR Report	Web	SPF	Distribution

[OK](#) [Cancel](#)

Process Monitor Page

ORACLE

Favorites > Main Menu > Purchasing > Requests > Reports > VT Req Budgetary Activity

Process List | Server List

View Process Request For

User ID: KJIAQUISH Type: Last 1 Hours Refresh

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input checked="" type="checkbox"/>	5706317		SQR Report	VTPOB002	KJIAQUISH	03/13/2012 2:23:29PM EDT	Success	Posted	Details

Go back to VT Req Budgetary Activity

Save Notify

Process List | Server List

Query Search Page

ORACLE

Favorites > Main Menu > Reporting Tools > Query > Query Manager

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Query | Create New Query

*Search By: Query Name begins with VT_POB002

Search Advanced Search

Search Results

*Folder View: - All Folders -

Check All Uncheck All Action: - Choose - Go

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	VT_POB002	RUN PROCESS FRST	Public		Edit	HTML	Excel	XML	Schedule

Find an Existing Query | Create New Query

Query Prompt Page

VT_PO8002 - RUN PROCESS FIRST

Process Instance:

[View Results](#)

Process Instance	Business Unit	Business Unit GL	Req ID	Req Status	Line	Sched Num	Distrib Line Num	DeptID	Class	ProjGr	Fund	Account	Budget Date From	Budget Date To	Program	Vendor ID	Original REQ Amount	Liquidated Amount	Am
------------------	---------------	------------------	--------	------------	------	-----------	------------------	--------	-------	--------	------	---------	------------------	----------------	---------	-----------	---------------------	-------------------	----

Example of Report Output

VT_PO8002 - RUN PROCESS FIRST

Process Instance:

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (3 kb)

View All

Process Instance	Business Unit	Business Unit GL	Req ID	Req Status	Line	Sched Num	Distrib Line Num	DeptID	Class	ProjGr	Fund	Account	Budget Date From	Budget Date To	Program	Vendor ID	Original REQ Amount	Liquidated Amount	Am
1	5706317	08110	08110	0000000138	C	1	1	1	8110000200		57100	522600	07/01/2011	03/12/2012			0.00	0.00	
2	5706317	08110	08110	0000000140	A	1	1	1	8110000200		57100	522400	07/01/2011	03/12/2012			20000.00	20000.00	
3	5706317	08110	08110	0000000140	A	2	1	1	8110000200		57100	522400	07/01/2011	03/12/2012			25000.00	25000.00	
4	5706317	08110	08110	0000000141	C	1	1	1	8110000200		57100	522400	07/01/2011	03/12/2012			171700.00	171700.00	
5	5706317	08110	08110	0000000142	C	1	1	1	8110000200		57100	520500	07/01/2011	03/12/2012			0.00	0.00	
6	5706317	08110	08110	0000000143	A	1	1	1	8110000200		57100	522400	07/01/2011	03/12/2012			320000.00	320000.00	
7	5706317	08110	08110	0000000144	A	1	1	1	8110000200		57100	512000	07/01/2011	03/12/2012			14570.00	14570.00	