# **VI\$ION**

## **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, code description, lead time days, account and account description   |

| VTPOINFO - | VTPOINFO – VT Cust Report of PO Spending  |  |
|------------|---|--|
| Purpose    | Lists all purchase orders and association contracts and transactions dates for a  |  |
|            |   |  |
| 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 NUMBER, business unit, department name, PO date, item, item description, contract number, PO quantity, amount, account, account description, fund, fund name, supplier name, 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,<br>supplier ID and name, PO line, PO quantity, unit of measure, price, recyclable<br>status; also 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 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 NUMBER, PO status, PO date, voucher ID; also prompted date range       |

| VT_MASTER | _CONTRACT_VCHR_PO – Contract Activity by Supplier  |
|-----------|--|
| Purpose   | Lists all contract vouchers and PO's for a supplier along with related contract  |
|           | Information  |
| Prompts   | Supplier set ID, supplier ID, range of payment dates   |
| Columns   | GL business unit, origin, contract ID, master contract ID, supplier 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 number, 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 number, account and account description,     |
|   | fund, program, class, project/grant, amount, accounting date                        |

| VT_PO_BUY | 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 number, PO date, PO line, PO description, requisition ID, requisition line, total distribution lines, PO total amount, budget check date, state |  |

| VT_PO_DETAIL_BY_VENDOR – PO Detail by Supplier |   |
|--|---|
| Purpose  | Lists all valid (not cancelled) PO's for a supplier and associated contract information |
| Prompts  | Set ID, supplier ID, PO business unit, PO date range                                    |
| Columns  | Supplier ID and name, PO business unit, PO number, PO date, PO status, PO line          |
|  | number, item ID, PO description, category, PO quantity, unit of measure, price per      |
|  | unit, total amount, contract ID, 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 number, PO date, vendor number and            |
|                            | name, contract ID, PO line number, PO quantity, unit price, PO 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 number, PO status, PO date, match action, match status, PO number, PO line number, template, type, PO amount voucher; 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; 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 | <b>_PO_XREF</b> – PO's for a Supplier   |
|-----------|---|
| Purpose   | Lists all PO's ever created for a particular supplier along with its current status |
| Prompts   | Supplier ID   |
| Columns   | PO business unit, PO number, PO date, supplier set ID, supplier number, PO status   |

| VT_RFQ_RESPONSE – Ranking RFQ Responses |   |
|---|---|
| Purpose                                 | Lists suppliers 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_P08001 | 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.   |  |
| Prompts   | Process instance  |  |
| Columns   | Process instance, PO business unit, GL business unit, PO ID, PO status, line<br>number, schedule number, distribution line number, dept ID, class, project/grant,<br>fund, account, budget date from, budget date to, program, contract ID, vendor,<br>vendor name, original PO amount, liquidated amount, vouchered amount,<br>remaining amount, PO reference, PO line description, buyer, PO date, accounting<br>date |  |

## **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, fund, dept ID, |
|   | program, class, project / grant, 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  |

| <b>VTPO006</b> – Q | Quote Groups for a supplier                              |
|--------------------|--|
| Purpose            | Lists the RFQ groups for the specified supplier          |
| Prompts            | Set ID, supplier ID                                      |
| Columns            | Supplier ID and name, location, group ID and description |

| VTPO006B – Quote groups listed by supplier |   |
|--|---|
| Purpose                                    | This query can be used two ways; 1) to list all suppliers with a particular quote |
|  | group, or 2) list all quote groups for a particular supplier. In either case the  |

|         | address description must be the ordering address (it must contain the word "order").   |
|---------|--|
| Prompts | Set ID (type "STATE"), supplier ID (use % for all), quote group ID (use % for all)   |
| Columns | Supplier ID and name, location, quote group ID and description, address, city, state, zip code, 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<br>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 | L_RFQ – Supplier RFQ Report   |
|-----------|---|
| Purpose   | Lists RFQ information for a range of RFQ opening dates  |
| Prompts   | Set ID, supplier ID (use % for all), range of opening dates, business unit (use % for all)  |
| Columns   | Business unit, supplier ID and name, supplier location, RFQ ID and reference, date<br>and time RFQ is opened, date and time RFQ is closed, date and time responded,<br>supplier responded (Y or N), quantity, req. line |

| VT_P08002 | 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<br>status, line number, schedule number, distribution line number, dept ID, class,<br>project/grant, fund, account, budget date from, budget date to, program, vendor<br>ID, original requisition amount, liquidated amount, PO amount, remaining amount,<br>requestor |  |  |  |  |  |  |  |  |

## **Purchasing Reports**

## VT PO Budgetary Activity Report (VT\_PO8001)

**Possible situations when this report should be run:** This report lists all active PO's with related information and amounts budgeted, liquidated, vouchered and remaining.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > VT PO Budgetary Activity Report

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > VT PO Budgetary Activity

#### Click on the Add a New Value tab

| VT PO Budgetary Activity     |                          |
|------------------------------|--------------------------|
| Add a New Value              | Q Find an Existing Value |
| *Run Control ID Run_VTPO8001 |                          |

#### **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\_VTPO8001)

#### Click the Add Button. The Vt Run Pos8001 page displays:

| Vt Run Pos8001        |                                  |                       |                        |                         |                    |
|-----------------------|----------------------------------|-----------------------|------------------------|-------------------------|--------------------|
| Run Control<br>Langua | ID Run_VTPO8001<br>Ige English v | Report                | Manager Process Mo     | nitor Run               |                    |
| Report Request Parar  | meters                           |                       |                        |                         |                    |
| Business Unit GL:     |                                  | m: 🛐 *To:             | 3                      |                         |                    |
| Remaining Amount:     |                                  | 0.000                 | This report will ret   | urn data meeting either |                    |
| PO Status:            | ~                                | ~                     | of the criteria spe    | cified in this box.     |                    |
| ChartField Sort Opti  | ons                              |                       | Personalize   Find   \ | /iew All   🖾   🔢 🛛 Firs | st 🕚 1 of 1 🕑 Last |
| *ChartField           | Short Name                       | From ChartField Value |                        | To ChartField Value     |                    |
| ACCOUNT               | Q Account                        |                       | Q                      |                         | Q 🕂 🗖              |
| Run Query VT_PO       | 98001 for VTPO8001 output        |                       |                        |                         |                    |
| 🔒 Save                |                                  |                       |                        | Add                     | 🕖 Update/Display   |

#### Enter information on the VT Run Pos8001 page:

- Business Unit GL Enter the Business unit; or use the lookup to select; or leave blank
- Budget Date From Enter desired Budget Date From; or use pop-up calendar to select
- To Enter desired Budget Date To; or use pop-up calendar to select
- Remaining Amount (box 1) Choose appropriate expression; or leave blank
- **Remaining Amount (box 2)** Enter the desired Remaining Amount; or leave blank
- PO Status (box 1) Choose appropriate expression; or leave blank
- **PO Status (box 2)** Choose the appropriate PO status from the drop-down menu; or leave blank
- Chartfield Enter Chartfield; or use lookup to select.
- From Chartfield Value Enter From Chartfield Value; or use lookup to select; or leave blank
- To Chartfield Value Enter From Chartfield Value; or use lookup to select; or leave blank

| Vt Run Pos8001                   |                              |                       |   |   |            |          |
|----------------------------------|------------------------------|-----------------------|---|---|------------|----------|
| Run Control ID<br>Language       | Run_VTPO8001<br>English v    | Report                | Manager Process M                         | onitor  |            |          |
| Report Request Paramet           | ters                         |                       |   |   |            |          |
| Business Unit GL: 034            | 40 🔍 *Budget Date From:      | 07/01/2022 🛐 *To:     | 06/30/2023                                |   |            |          |
| Remaining Amount: > PO Status: = | <ul> <li>Approved</li> </ul> | 1000.000              | This report will re<br>of the criteria sp | eturn data meeting either<br>ecified in this box. |            |          |
| ChartField Sort Options          | 3                            |                       | Personalize   Find                        | View All   🖾   📑 💦 Firs                           | t 🕙 1 of 1 | 🕑 Last   |
| *ChartField                      | Short Name                   | From ChartField Value |   | To ChartField Value                               |            |          |
| ACCOUNT                          | Account                      |                       | Q   |   | Q          | + -      |
| Run Query VT_PO800               | )1 for VTPO8001 output       |                       |   | Add   | Jundate    | /Display |

Click Run button. The Process Scheduler Request page displays:

| Process Scheduler F       | Request         |              |  |           |                |               |     |
|---------------------------|-----------------|--------------|--|-----------|----------------|---------------|-----|
| User ID                   | DBROCHU         |              | Run Control ID                         | Run_VTPO8 | 8001           |               | Hel |
| Server Name<br>Recurrence |                 | → Ru<br>→ Ru | n Date 01/22/2024<br>n Time 11:51:19AM | Ħ         | Reset to Curre | ent Date/Time |     |
| Time Zone                 | Q               |              |  |           |                |               |     |
| Process List              |                 |              |  |           |                |               |     |
| Select Description        |                 | Process Name | Process Type                           | *Type     | *Format        | Distribution  |     |
| VT Purchasing B           | Budget Activity | VTP08001     | SQR Report                             | Web       | SPF            | Distribution  |     |
| OK Cancel                 |                 |              |  |           |                |               |     |

#### On the Process Scheduler Request page, select:

- **Type** Choose desired value Web is recommended
- Format Default is SPF

#### **Click the OK button**

#### The VtRun Pos8001 page displays:

Click the **Process Monitor** link

#### The Process List page displays:

| Proces                            | ss List   | Server List |                |              |                 |         |                           |            |                        |         |            |
|-----------------------------------|---|-------------|----------------|--------------|-----------------|---------|---------------------------|------------|------------------------|---------|------------|
| View Pro<br>User<br>Serv<br>Run S | View Process Requests User ID DBROCHU Q Type v Last v 20 Minutes v Refresh Server V Name Q Instance Range Clear Run Status V Distribution Status V Save On Refresh Report Manager Reset |             |                |              |                 |         |                           |            |                        |         |            |
| ✓ Proces                          | Run Status V Distribution Status V Save On Refresh <u>Report Manager</u> Reset  |             |                |              |                 |         |                           |            |                        |         |            |
|                                   | ۱.  |             |                |              |                 |         |                           |            | < < 1-1 of 1           | 1 v >   | > View All |
| Select                            | Instance  | Seq.        | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time             | Run Status | Distribution<br>Status | Details | Actions    |
|                                   | 12437258  |             | Run_VTPO8001   | SQR Report   | VTPO8001        | DBROCHU | 01/22/2024 11:51:19AM EST | Success    | Posted                 | Details | ✓Actions   |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

• Note the Process Instance Number (example: 12437258)

Go to Navigation (Path) to the Query: Reporting Tools > Query > Query Viewer

The Query View page displays:

Type "VT\_PO8001"

#### **Click the Search Button**

| Query Viewer  |                       |        |           |                |                 |               |          |                         |                     |  |
|---|-----------------------|--------|-----------|----------------|-----------------|---------------|----------|-------------------------|---------------------|--|
| inter any information you have and click Search. Leave fields blank for a list of all values. |                       |        |           |                |                 |               |          |                         |                     |  |
| *Search By  | Query Name v begins w | ith    | VT_PO8001 |                |                 |               |          |                         |                     |  |
| Search  | Advanced Search       |        |           |                |                 |               |          |                         |                     |  |
| Search Results  |                       |        |           |                |                 |               |          |                         |                     |  |
| *Folder View  | All Folders V         |        |           |                |                 |               |          |                         |                     |  |
| Query   |                       |        |           |                |                 |               |          |                         |                     |  |
| E, Q  |                       |        |           |                |                 |               |          | < < 1-1 of 1 🗸 > >      | View All            |  |
| Query Name  | Description           | Owner  | Folder    | Run to<br>HTML | Run to<br>Excel | Run to<br>XML | Schedule | Definitional References | Add to<br>Favorites |  |
| VT_PO8001   | RUN Process First     | Public |           | HTML           | Excel           | XML           | Schedule | Lookup References       | Favorite            |  |

Click the **Excel** hyperlink and The query prompt page will display:

| VT_PO8001 - RUN Process First | t |
|-------------------------------|---|
| *Process Instance 0 Q         |   |
| View Results                  |   |

Enter or select from the lookup the Process Instance from previous step (Note: If your report has no results your process instance will not be selectable and will return a message saying that it was an invalid value).

Click View Results and open the excel file

Example of Report Output

| Process<br>Instance | Business<br>Unit | Business<br>Unit GL | PO ID      | PO<br>Status | Line | Sched<br>Num | Distrib<br>Line Num | DeptID | Class | Proj/Grt | Fund | Account | Budget<br>Date<br>From | Budget<br>Date To | Program | Contract ID                   | Vendor     |
|---------------------|------------------|---------------------|------------|--------------|------|--------------|---------------------|--------|-------|----------|------|---------|------------------------|-------------------|---------|-------------------------------|------------|
| 9472976             | 03440            | 03440               | 0000015054 | D            | 2    | 1            | 1                   |        |       |          |      | 603380  | 7/1/2018               | 6/30/2019         |         | 00000000000000000000000029208 | 0000002975 |
| 9472976             | 03440            | 03440               | 0000015148 | D            | 1    | 1            | 2                   |        |       |          |      | 600180  | 7/1/2018               | 6/30/2019         |         |                               | 0000002979 |
| 9472976             | 03440            | 03440               | 0000015174 | D            | 1    | 1            | 2                   |        |       |          | 3    | 603360  | 7/1/2018               | 6/30/2019         |         |                               | 0000005854 |

| Vendor Name                        | Original PO<br>Amount | Liquidated<br>Amount | Vouchered<br>Amount | Remaining<br>Amount | PO Ref                | P.O. Line Description | Buyer    | PO Date   | Acctg Date |
|------------------------------------|-----------------------|----------------------|---------------------|---------------------|-----------------------|-----------------------|----------|-----------|------------|
| Family Center of Washington County | 588456.00             | 103311.710           | 103311.710          | 485144.290          | 29208                 | FY2019 EXP 06/30/2019 | LCARPEN2 | 7/13/2017 | 7/5/2018   |
| Family Center of Washington County | 6234.15               | 0.000                | 0.000               | 6234.150            | 03440-34107-18-ELCG24 | FY2018 EXP 12/31/2017 | JTOUCHE2 | 7/27/2017 | 7/1/2018   |
| Umbrella Inc of St Johnsbury       | 2300.07               | 1010.400             | 1010.400            | 1289.670            | 03440-30042-17-CCCSA  | FY2018 EXP 12/31/2017 | BTOUCHET | 7/31/2017 | 7/1/2018   |

## Open Purchase Order Report (POROL001)

**Possible situations when this report should be run:** This report reviews open POs for the budget year-end process.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Open Purchase Order Report

**Navigator Menu navigation:** Purchasing > Purchase Orders > Budget Year End Processing > Open Purchase Order Report

#### Click on the Add a New Value tab

| Open Purchase Order         |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| Run Control ID Run_POROL001 |                          |

#### **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)

#### Click the Add Button

#### The Open Purchase Order Report page displays:

| Open Purchase O              | rder Report                                      |                         |                      |
|------------------------------|--|-------------------------|----------------------|
| Open Purchase Or             | der Report                                       |                         |                      |
|                              |  |                         |                      |
| R                            | un Control ID Run_POROL001<br>Language English v | Report Manager          | Process Monitor Run  |
| Report Request Parame        | ters   |                         |                      |
| Business Unit<br>Supplier ID | 01110<br>Q                                       | Ledger Group            | ٩                    |
| Budget Date Range            |  |                         |                      |
| From Date                    | 3  | To Date                 | 31                   |
|                              |  | Refresh                 |                      |
| ChartField Selection         | Personalize   Find   💷   🔣                       | First 🕚 1-6 of 6 🕑 Last |                      |
| Sequence                     | Field Long Name                                  | Include CF              |                      |
| 1                            | Account  |                         |                      |
| 2                            | Fund Code  |                         |                      |
| 3                            | Department                                       |                         |                      |
| 4                            | Program Code                                     |                         |                      |
| 5                            | Class Field                                      |                         |                      |
| 6                            | Project  |                         |                      |
| 🖷 Save 🖃 Notify              |  |                         | Add 🕖 Update/Display |

#### Enter information on the Open Purchase Order page:

- Business Unit Enter the Business Unit; or click on magnifying glass to lookup; or leave blank
- Ledger Group Enter the Ledger Group; or click on magnifying glass to lookup; or leave blank
- **Supplier ID** Enter the Supplier ID; or click on magnifying glass to lookup; or leave blank
- 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; or leave blank to include all dates up to the current day.
- **Chartfield Selection** Select the chartfields you want included. You can also change the order each chartfield appears on the report.

| Open Purchase Or                            | der Report                                       |                         |                       |  |  |  |
|---|--|-------------------------|-----------------------|--|--|--|
| R   | un Control ID Run_POROL001<br>Language English v | Report Manage           | r Process Monitor Run |  |  |  |
| Report Request Parame                       | ters   |                         |                       |  |  |  |
| Business Unit                               | 02140  | Ledger Group            | Q                     |  |  |  |
| Supplier ID                                 | 0000041897 🔍                                     |                         |                       |  |  |  |
| Budget Date Range                           |  |                         |                       |  |  |  |
| From Date 07/01/2022 3 To Date 06/30/2023 3 |  |                         |                       |  |  |  |
|   |  | Refresh                 |                       |  |  |  |
| ChartField Selection                        | Personalize   Find   💷   🔣                       | First 🕚 1-6 of 6 🕑 Last |                       |  |  |  |
| Sequence                                    | Field Long Name                                  | Include CF              |                       |  |  |  |
| 1   | Account  |                         |                       |  |  |  |
| 2   | Fund Code  |                         |                       |  |  |  |
| 3   | Department                                       |                         |                       |  |  |  |
| 4   | Program Code                                     |                         |                       |  |  |  |
| 5   | Class Field                                      |                         |                       |  |  |  |
| 6   | Project  |                         |                       |  |  |  |
| Save E Notify                               |  |                         | Add 🖉 Update/Display  |  |  |  |

## Click the Run Button. The Process Scheduler Request page displays:

| Proces  | ss Scheduler                           | Request                     |                                       |  |       |         |                            |  |  |  |
|---|--|-----------------------------|---------------------------------------|--|-------|---------|----------------------------|--|--|--|
|   | User ID                                | Run Control ID Run_POROL001 |                                       |  |       |         |                            |  |  |  |
|   | Server Name<br>Recurrence<br>Time Zone | Q                           | <ul><li>✓ Run</li><li>✓ Run</li></ul> | V         Run Date         01/22/2024         1           V         Run Time         1:00:05PM |       |         | Reset to Current Date/Time |  |  |  |
| Proce   | ess List                               |                             |                                       |  |       |         |                            |  |  |  |
| Select  | Description                            |                             | Process Name                          | Process Type   | *Type | *Format | Distribution               |  |  |  |
| <ul> <li>Image: A set of the set of the</li></ul> | Open Purchase                          | e Order                     | POROL001                              | SQR Report   | Web   | V PDF   | ✓ Distribution             |  |  |  |
| OK  | Cancel                                 | I                           |                                       |  |       |         |                            |  |  |  |

#### On the Process Scheduler Request page, select:

- **Type** Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### Click the OK button.

The Open Purchase Order Report page displays:

Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proce                            | ess List                        | Server List |                                    |              |                            |                        |                          |            |                        |         |            |
|----------------------------------|---------------------------------|-------------|------------------------------------|--------------|----------------------------|------------------------|--------------------------|------------|------------------------|---------|------------|
| View Pro<br>User<br>Ser<br>Run S | DDBROCH                         | +UQ<br>v    | Type<br>Name<br>Distribution State |              | v Lice V Save On V Save On | 20<br>Range<br>Refresh | Minutes                  |            |                        |         |            |
|                                  |                                 |             |                                    |              |                            |                        |                          |            | < < 1-1 of             | 1 ~ >   | > View All |
| Select                           | Instance                        | Seq.        | Run Control ID                     | Process Type | Process<br>Name            | User                   | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions    |
|                                  | 12437259                        |             | Run_POROL001                       | SQR Report   | POROL001                   | DBROCHU                | 01/22/2024 1:00:05PM EST | Success    | Posted                 | Details | ✓Actions   |
| Go back to<br>Save               | o Open <u>P</u> urcha<br>Notify | ase Order   |                                    |              |                            |                        |                          |            |                        |         |            |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted" Click on <u>Report Manager</u> link. Click on the Administration tab

Click on Open Purchase Order link

| List        | Explorer     | Administra       | tion Archives |                            |                      |         |                   |                  |         |
|-------------|--------------|------------------|---------------|----------------------------|----------------------|---------|-------------------|------------------|---------|
| View Repo   | rts For      |                  |               |                            |                      |         |                   |                  |         |
| User ID     | DBROCHU      | Тур              | e             | <ul> <li>✓ Last</li> </ul> | ~                    | 5 Da    | ys v              |                  | Refresh |
| Status      |              | ✓ Folde          | r             | Instance                   | to                   |         |                   |                  |         |
| Report List |              |                  |               |                            |                      |         |                   |                  |         |
| R Q         |              |                  |               |                            | I< < <b>1-30</b>     | of 30 🗸 | > >               | View All         |         |
| Select      | Report<br>ID | Prcs<br>Instance | Description   |                            | Request<br>Date/Time | of 30 v | > >    <br>Status | View All Details |         |

## Example of Report Output

| Operato<br>Run Cor<br>Budget I | D: POROLO<br>r ID: SSMITH2<br>htrol: Run_Ope<br>Date: 07/01/201 | 01<br>9<br>9 PO_Rpt<br>18 To:06/3 | t<br>30/2020             |                           | PeopleSoft Purchasing<br>OPEN PURCHASE ORDER REPORT - OPEN PO LOOKUP |          |                                 |                        |                | Page :<br>Run Date<br>Run Time | 1<br>01/18/2019<br>09:09:11   |   |                  |
|--------------------------------|---|-----------------------------------|--------------------------|---------------------------|--|----------|---------------------------------|------------------------|----------------|--------------------------------|-------------------------------|---|------------------|
| BU Pure                        | chase Order Lin<br>0000041146 DF                                | e/Sch/Dist<br>TE: 08/29           | <u>Oriq Qty</u><br>/2018 | Oty Remain<br>Supplier: 0 | Orig Encumb<br>000041897   | Encumb F | Remain <u>Cur</u><br>DICALSER-0 | rency Or               | iq Encumb Base | Encumb Remain Base<br>BUYER :  | Base Currency<br>Jordan Black | <u>y</u> <u>Item Descriptio</u><br>Deegan | n                |
|                                | 1   | 1 1                               | 1.00                     | 0.00                      | 6,090.   | 00       | 0.00 USE                        | )                      | 6,090.00       | 0.00                           | USD                           | Blood Toxicolog                           | gy Testing & Ser |
|                                | Distrib Typ<br>Expense  | <u>GL BU</u><br>02140             | <u>Account</u><br>507600 | <u>Fund</u><br>21500      | Department<br>2140091000   | Program  | <u>Class</u>                    | Project<br>NH18405D-0  | 27             |                                |                               |   |                  |
|                                | Ledger Grou<br>PRMST_EXP  | 02140                             | Account                  | Fund                      | Department   | Program  | <u>Class</u>                    | Project<br>NH18405D-0  | 27             |                                |                               |   |                  |
|                                |   |                                   |                          |                           |  |          |                                 |                        |                |                                | I                             | O TOTAL                                   | 6,090.00         |
|                                | 0000041437 DF   | TE: 10/03                         | /2018                    | Supplier: 0               | 000041897  | NAME: ME | DICALSER-0                      | 01                     |                | BUYER:                         | Angelo Thoma                  | as Filippone                              |                  |
|                                | 1   | . 1 1                             | 1.00                     | 0.00                      | 9,130.   | 00       | 0.00 USE                        |                        | 9,130.00       | 0.00                           | USD                           | Blood Toxicolog                           | gy Testing & Se  |
|                                | Distrib Typ<br>Expense  | 02140                             | Account<br>519170        | <u>Fund</u><br>21500      | Department<br>2140091000   | Program  | Class                           | Project<br>NH18405D-03 | 27             |                                |                               |   |                  |
|                                | Ledger Grou<br>PRMST_EXP  | 02140                             | Account                  | Fund                      | Department   | Program  | <u>Class</u>                    | Project<br>NH18405D-0  | 27             |                                |                               |   |                  |
|                                |   |                                   |                          |                           |  |          |                                 |                        |                |                                |                               |   |                  |

## Expediting Report - By Buyer (POX4006)

**Possible situations when this report should be run:** This report provides purchase order details such as late days and due date sorted by buyer. Use it to help determine which purchase orders may require expediting.

Three reports can be produced from the same run control page: Expediting Report by Buyer (POX4006), Expediting Report by Supplier (POX4007), and Expediting Report by Due Date (POX4008).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Expediting Report

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Expediting

#### Click on the Add a New Value tab

| Expediting Report           |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| *Run Control ID Run_POX4006 |                          |

#### **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\_POX4006)

#### **Click the Add Button**

#### The Expediting page displays:

| Expediting           |                        |                                    |
|----------------------|------------------------|------------------------------------|
| Run                  | Control ID Run_POX4006 | Report Manager Process Monitor Run |
|                      | Language English v     |                                    |
| Report Request Param | eters                  |                                    |
| From Date            | (ii)                   | Through Date                       |
| Supplier SetID       | ٩                      |                                    |
| Supplier ID          | Q                      |                                    |
| Buyer                | Q                      |                                    |
|                      |                        |                                    |
| Save Notify          |                        | 📑 Add 🛛 🖉 Update/Display           |

#### Enter information on the Expediting page:

- From Date Enter date; or use pop-up calendar to select
- Through Date Enter Date; or use pop-up calendar to select
- Supplier SetID Type STATE (default)
- Supplier ID Enter the Supplier ID; or click on magnifying glass to lookup; or leave blank
- Buyer Enter the Buyer; or click on magnifying glass to lookup; or leave blank

| Expediting                 |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4006 | Report Manager Process Monitor Run |
| Länguage English V         |                                    |
|                            |                                    |
| From Date 07/01/2022       | Through Date 06/30/2023            |
| Supplier SetID STATE       |                                    |
| Supplier ID 0000041897     |                                    |
| Buyer                      |                                    |
|                            |                                    |
| Save Notify                | 📑 Add 🖉 Update/Display             |

#### **Click Run button**

#### The Process Scheduler Request page displays:

| Process Scheduler Request |                               |              |                   |            |                 |              |      |  |  |
|---------------------------|-------------------------------|--------------|-------------------|------------|-----------------|--------------|------|--|--|
|                           |                               |              |                   |            |                 |              | Help |  |  |
|                           | User ID DBROCHU               |              | Run Control ID    | Run_POX400 | 6               |              |      |  |  |
|                           | Server Name                   | ✓ Ru         | n Date 01/22/2024 | <b>B1</b>  |                 |              |      |  |  |
|                           | Recurrence                    | → Ru         | n Time 1:51:47PM  | F          | Reset to Curren | nt Date/Time | ]    |  |  |
|                           | Time Zone                     |              |                   |            |                 |              |      |  |  |
| Proce                     | ess List                      |              |                   |            |                 |              |      |  |  |
| Select                    | Description                   | Process Name | Process Type      | *Type      | *Format         | Distribution |      |  |  |
|                           | Expediting Report by Buyer    | POX4006      | BI Publisher      | Web 💊      | PDF v           | Distribution |      |  |  |
|                           | Expediting Report by Supplier | POX4007      | BI Publisher      | Web 💊      | PDF v           | Distribution |      |  |  |
|                           | Expediting Report by Due Date | POX4008      | BI Publisher      | Web 💊      | PDF v           | Distribution |      |  |  |
| Ok                        | Cancel                        |              |                   |            |                 |              |      |  |  |

#### On the Process Scheduler Request page, select:

- Select Choose desired report (POX4006)
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

#### The Expediting page displays: Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proce  | ess List      | Server List |                |              |                 |         |                          |            |                        |         |            |
|--|---------------|-------------|----------------|--------------|-----------------|---------|--------------------------|------------|------------------------|---------|------------|
| View Process Requests<br>User ID DBROCHU Q Type v Last v 20 Minutes Refresh<br>Server V Name Q Instance Range Clear<br>Run Status V Distribution Status V Save On Refresh Report Manager Reset |               |             |                |              |                 |         |                          |            |                        |         |            |
| ✓ Proce  | ss List<br>ર  |             |                |              |                 |         |                          |            | <                      | 3 ~ >   | > View All |
| Select   | Instance      | Seq.        | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions    |
|  | 12437262      |             | Run_POX4006    | BI Publisher | POX4008         | DBROCHU | 01/22/2024 1:48:28PM EST | Success    | Posted                 | Details | ∼Actions   |
|  | 12437261      |             | Run_POX4006    | BI Publisher | POX4007         | DBROCHU | 01/22/2024 1:48:28PM EST | Success    | Posted                 | Details | ∽Actions   |
|  | 12437260      |             | Run_POX4006    | BI Publisher | POX4006         | DBROCHU | 01/22/2024 1:48:28PM EST | Success    | Posted                 | Details | ∽Actions   |
| Go back to<br>Save   | Expediting Re | eport       |                |              |                 |         |                          |            |                        |         |            |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

#### Click on the Administration tab

#### Click on <u>POX4006 – POX4006.pdf</u> link

| List                 | Explorer           | Administra       | tion Archives         |                         |                    |        |          |         |
|----------------------|--------------------|------------------|-----------------------|-------------------------|--------------------|--------|----------|---------|
| View Repo<br>User ID | rts For<br>DBROCHU | Тур              | e 🔹 🗸                 | Last v                  | 5 Day              | ys v   | [        | Refresh |
| Status               |                    | ~ Folde          | r v Instance          | to                      |                    |        |          |         |
| Penert List          |                    |                  |                       |                         |                    |        |          |         |
|                      |                    |                  |                       | < < 1-33                | of 33 v            | > >    | View All |         |
| Select               | Report<br>ID       | Prcs<br>Instance | Description           | Request<br>Date/Time    | Format             | Status | Details  |         |
|                      | 5514140            | 12437260         | POX4006 - POX4006.pdf | 01/22/2024<br>1:51:40PM | Acrobat<br>(*.pdf) | Posted | Details  |         |
|                      | 5514139            | 12437261         | POX4007 - POX4007.pdf | 01/22/2024<br>1:51:40PM | Acrobat<br>(*.pdf) | Posted | Details  |         |
|                      | 5514138            | 12437262         | POX4008 - POX4008.pdf | 01/22/2024<br>1:51:38PM | Acrobat<br>(*.pdf) | Posted | Details  |         |

## Example of Report Output

| ORACI                                     | LE                                  | Report ID:<br>User ID:<br>Run Contro | POX4006<br>SSMITH2<br>I: Run_Expe<br>ports | editing_Re                 | E   | PeopleSoft F | Purchasing<br>ORT BY BUYER          |   |      |      | Page N<br>Run Da<br>Run Tin | o. 1<br>te 1/18<br>ne 9:33 | /2019<br>:43 AM |
|---|-------------------------------------|--------------------------------------|--|----------------------------|-----|--------------|-------------------------------------|---|------|------|-----------------------------|----------------------------|-----------------|
| Due Dates Incl<br>Buyer: Ange<br>Due Date | luded :<br>elo Thor<br>Days<br>Late | 07/01/2018<br>nas Filippone<br>BU    | Thru: 06/30/2<br>PO ID                     | 020<br>Contract ID         | Rel | Supplier ID  | Supplier Name Item                  | ID Item Description                       | Line | Schd | Ord Qty                     | UOM                        | Shipto ID       |
| 10/03/2018                                | 107                                 | 02140                                | 0000041437                                 | 00000000000000000033153    | 21  | 0000041897   | National<br>Medical<br>Services Inc | Blood Toxicology<br>Testing &<br>Services | 1    | 1    | 1                           | EA                         | PDPSWTB<br>001  |
| 10/11/2018                                | 99                                  | 02140                                | 0000041514                                 | 00000000000000000000033153 | 22  | 0000041897   | National<br>Medical<br>Services Inc | Blood Toxicology<br>Testing &<br>Services | 1    | 1    | 1                           | EA                         | PDPSWTB<br>001  |
| 10/16/2018                                | 94                                  | 02140                                | 0000041540                                 | 000000000000000000033153   | 23  | 0000041897   | National<br>Medical<br>Services Inc | Blood Toxicology<br>Testing &<br>Services | 1    | 1    | 1                           | EA                         | PDPSWTB<br>001  |

## Expediting Report - By Supplier (POX4007)

**Possible situations when this report should be run:** This report provides purchase order details such as late days and due date sorted by Due Date. Use it to help determine which purchase orders may require expediting.

Three reports can be produced from the same run control page: Expediting Report by Buyer (POX4006), Expediting Report by Supplier (POX4007), and Expediting Report by Due Date (POX4008).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Expediting Report

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Expediting

#### Click on the Add a New Value tab

| Expediting Report           |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| *Run Control ID Run_POX4007 |                          |

#### **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\_POX4007)

#### **Click the Add Button**

#### The Expediting page displays:

| Expediting               |                      |                                    |
|--------------------------|----------------------|------------------------------------|
| Run Co                   | ntrol ID Run_POX4007 | Report Manager Process Monitor Run |
| La                       | nguage English 🗸     |                                    |
| Report Request Parameter | ers                  |                                    |
| From Date                | 31                   | Through Date                       |
| Supplier SetID           | Q                    |                                    |
| Supplier ID              | 0                    |                                    |
| Buyer                    | Q                    |                                    |
|                          |                      |                                    |
| 🔚 Save 🔚 Notify          |                      | 📑 Add 🖉 Update/Display             |

#### Enter information on the Expediting page:

- From Date Enter date; or use pop-up calendar to select
- Through Date Enter Date; or use pop-up calendar to select
- Supplier SetID Type STATE (default)
- Supplier ID Enter the Supplier ID; or click on magnifying glass to lookup; or leave blank
- **Buyer** Enter the Buyer; or click on magnifying glass to lookup; or leave blank

| Expediting                 |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4007 | Report Manager Process Monitor Run |
| Language English 🗸         |                                    |
| Report Request Parameters  |                                    |
| From Date 07/01/2022       | Through Date 06/30/2023            |
| Supplier SetID STATE       |                                    |
| Supplier ID 0000041897 Q   |                                    |
| Buyer                      |                                    |
|                            |                                    |
| Save Notify                | 📑 Add 🗾 Update/Display             |

**Click Run button** 

#### The Process Scheduler Request page displays:

| Proce  | ss Schedule   | r Request        |              |                    |          |     |              |            |              | ×    |
|--------|---------------|------------------|--------------|--------------------|----------|-----|--------------|------------|--------------|------|
|        |               |                  |              |                    |          |     |              |            |              | Help |
|        | User ID       | DBROCHU          |              | Run Control ID     | Run_POX4 | 006 |              |            |              |      |
|        | Server Name   |                  | ~ Rt         | In Date 01/22/2024 | 31       |     |              |            |              |      |
|        | Recurrence    | •                | ∼ Ru         | In Time 1:51:47PM  |          | Re  | eset to Curr | rent       | Date/Time    | ]    |
|        | Time Zone     |                  |              |                    |          |     |              |            |              |      |
| Proce  | ess List      |                  |              |                    |          |     |              |            |              |      |
| Select | Description   |                  | Process Name | Process Type       | *Type    |     | *Format      |            | Distribution |      |
|        | Expediting Re | port by Buyer    | POX4006      | BI Publisher       | Web      | ~   | PDF          | <b>v</b>   | Distribution |      |
| ✓      | Expediting Re | port by Supplier | POX4007      | BI Publisher       | Web      | ×   | PDF          | <b>v</b> ] | Distribution |      |
|        | Expediting Re | port by Due Date | POX4008      | BI Publisher       | Web      | ~   | PDF          | ~          | Distribution |      |
| OK     | Canc          | el               |              |                    |          |     |              |            |              |      |

#### On the Process Scheduler Request page, select:

- Select Choose desired report (POX4007)
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

Click the **Process Monitor** link

#### The Process List page displays:

| Proces           | ss List     | erver List |                  |              |                 |             |                          |            |                        |         |            |
|------------------|-------------|------------|------------------|--------------|-----------------|-------------|--------------------------|------------|------------------------|---------|------------|
| View Pro<br>User | cess Reques | u Q        | Туре             | ∽ Last       | ~               | 20          | Minutes v                | Refresh    |                        |         |            |
| Serv             | er          | ~          | Name             | Q Insta      | nce 124         | 37261 Range |                          | Clear      |                        |         |            |
| Run S            | tatus       | ~          | Distribution Sta | tus          | Save 🖌          | On Refresh  | Report Manager           | Reset      |                        |         |            |
| ~ Proces         | ss List     |            |                  |              |                 |             |                          |            |                        |         |            |
|                  | <i>ک</i>    |            |                  |              |                 |             |                          |            | < 1-1 of               | 1 🗸 🚿   | > View All |
| Select           | Instance    | Seq.       | Run Control ID   | Process Type | Process<br>Name | User        | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions    |
|                  | 12437261    |            | Run_POX4006      | BI Publisher | POX4007         | DBROCHU     | 01/22/2024 1:48:28PM EST | Success    | Posted                 | Details | ∽Actions   |

#### Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

Click on <u>Report Manager</u> link.

**Click on the Administration tab** 

| List  | Explorer                       | Administration  | Archives  |  |   |                  |                          |         |
|---|--------------------------------|---|---|--|---|------------------|--------------------------|---------|
| View Repo                                       | rts For                        |   |   |  |   |                  |                          |         |
| User ID   | DBROCHU                        | Туре  | ∽ Las   | st v   | 5   | Days             | ✓                        | Refresh |
| Status  |                                | ~ Folder  | ∽ Instance  | 12437261 <b>to</b>   | 12437261  | 1                |                          |         |
|   |                                |   |   |  |   |                  |                          |         |
| eport List                                      |                                |   |   |  |   |                  |                          |         |
| -   |                                |   |   |  |   |                  |                          | 1       |
| E, Q  |                                |   |   | K <  | 1-1 of 1  | ✓ > >            | View All                 |         |
| E Q<br>Select                                   | Report<br>ID                   | Prcs<br>Instance  | Description   | K <<br>Request<br>Date/Time                                | 1-1 of 1  | > >><br>Status   | View All Details         |         |
| E Q<br>Select                                   | Report<br>ID<br>5514139        | Prcs<br>Instance  | Description POX4007 - POX4007.pdf   | Request<br>Date/Time           01/22/2024<br>1:51:40PM     | 1-1 of 1 v<br>Format<br>Acrobat<br>(*.pdf)            | Status Posted    | View All Details Details |         |
| E, Q<br>Select                                  | Report<br>ID<br>5514139        | Prcs<br>Instance<br>12437261<br>Deselect All                        | Description       POX4007 - POX4007.pdf   | Request Date/Time           01/22/2024           1:51:40PM | Interference       Format       Acrobat       (*.pdf) | Status Posted    | View All Details Details |         |
| E Q<br>Select<br>Select<br>Select All<br>Delete | Report<br>ID           5514139 | Prcs<br>Instance<br>12437261<br>Deselect All<br>Click the delete bu | Description         POX4007 - POX4007.pdf         tton to delete the selected report(s) | Request Date/Time           01/22/2024           1:51:40PM | 1-1 of 1       Format       Acrobat       (*.pdf)     | Status<br>Posted | View All Details Details |         |

Click on <u>POX4007 – POX4007.pdf</u> link

## Example of Report Output

Г

| ORACLE                                       | Report<br>User ID<br>Run Co | ID:<br>I:<br>ontrol:     | POX4007<br>SSMITH:<br>Run_Exp    | 2<br>pediting_Reports        |     | PeopleSoft<br>EXPEDITING REP | t Purchasing<br>ORT BY SU | PPLIER   |      |      | Page No.<br>Run Date<br>Run Time | 1<br>1/18<br>9:44 | /2019<br>:00 AM |
|--|-----------------------------|--------------------------|----------------------------------|------------------------------|-----|------------------------------|---------------------------|--|------|------|----------------------------------|-------------------|-----------------|
| Oue Dates Included :<br>Supplier ID : 000004 | 07/01/20<br>\$1897 <b> </b> | 118 Thru:<br>National Me | 06/30/2020<br>dical Services Inc |                              |     |                              |                           |  |      |      |                                  |                   |                 |
| Due Date                                     | Days<br>Late                | BU                       | POID                             | Contract ID                  | Rel | Buyer                        | Item ID                   | Item Description   | Line | Schd | Ord Qty                          | UOM               | Shipto ID       |
| 08/09/2018                                   | 162                         | 03420                    | 0000061924                       | 00000000000000000000026389   | 67  | Lisa E Hill                  |                           | Provide toxicological<br>analysis of postmortem<br>specimens with<br>screening and<br>confirmation, storage of<br>specimens, and proper<br>chain of custody<br>protocol. | 1    | 1    | 1                                | EA                | PHEABR<br>003   |
| 08/22/2018                                   | 149                         | 03420                    | 0000062032                       | 0000000000000000000000026389 | 68  | Lisa E Hill                  |                           | Provide toxicological<br>analysis of postmortem<br>specimens with<br>screening and<br>confirmation, storage of<br>specimens, and proper<br>chain of custody<br>protocol. | 1    | 1    | 1                                | EA                | PHEABF<br>003   |
| 08/29/2018                                   | 142                         | 02140                    | 0000041146                       | 0000000000000000000033153    | 20  | Jordan Black-Deegan          |                           | Blood Toxicology<br>Testing & Services   | 1    | 1    | 1                                | EA                | PDPSW<br>B001   |

## Expediting Report - By Due Date (POX4008)

**Possible situations when this report should be run:** This report provides purchase order details such as late days and due date sorted by supplier. Use it to help determine which purchase orders may require expediting.

Three reports can be produced from the same run control page: Expediting Report by Buyer (POX4006), Expediting Report by Supplier (POX4007), and Expediting Report by Due Date (POX4008).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Expediting Report

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Expediting

#### Click on the Add a New Value tab

| Expediting Report           |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| *Run Control ID Run_POX4008 |                          |

#### **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\_POX4008)

#### **Click the Add Button**

#### The Expediting page displays:

| Expediting           |                          |                                    |
|----------------------|--------------------------|------------------------------------|
| Rui                  | n Control ID Run_POX4008 | Report Manager Process Monitor Run |
|                      | Language English V       |                                    |
| Report Request Param | neters                   |                                    |
| From Date            | iii                      | Through Date                       |
| Supplier SetID       | Q                        |                                    |
| Supplier ID          | Q                        |                                    |
| Buyer                | Q                        |                                    |
|                      |                          |                                    |
| 📄 Save 🔛 Notify      |                          | 📑 Add 🛛 🖉 Update/Display           |

#### Enter information on the Expediting page:

- From Date Enter date; or use pop-up calendar to select
- Through Date Enter Date; or use pop-up calendar to select
- Supplier SetID Type STATE (default)
- Supplier ID Enter the Supplier ID; or click on magnifying glass to lookup; or leave blank
- Buyer Enter the Buyer; or click on magnifying glass to lookup; or leave blank

| Expediting                 |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4008 | Report Manager Process Monitor Run |
| Language English v         |                                    |
| Report Request Parameters  |                                    |
| From Date 07/01/2022       | Through Date 06/30/2023            |
| Supplier SetID STATE       |                                    |
| Supplier ID 0000041897     |                                    |
| Buyer                      |                                    |
|                            |                                    |
| Save ENotify               | 📑 Add 🛛 🔎 Update/Display           |

#### **Click Run button**

Г

#### The Process Scheduler Request page displays:

| Proces | ss Scheduler   | Request          |              |                   |           |     |           |        |              |
|--------|----------------|------------------|--------------|-------------------|-----------|-----|-----------|--------|--------------|
|        | User ID        | DBROCHU          |              | Run Control ID    | Run_POX4  | 006 |           |        |              |
|        | Server Name    |                  | ∼ Ru         | n Date 01/22/2024 | <b>Bi</b> |     |           |        |              |
|        | Recurrence     |                  | ✓ Ru         | n Time 1:51:47PM  |           | Re  | set to Cu | irrent | Date/Time    |
|        | Time Zone      | Q                |              |                   |           |     |           |        |              |
| Proce  | ss List        |                  |              |                   |           |     |           |        |              |
| Select | Description    |                  | Process Name | Process Type      | *Type     |     | *Format   |        | Distribution |
|        | Expediting Rep | oort by Buyer    | POX4006      | BI Publisher      | Web       | ~   | PDF       | ~      | Distribution |
|        | Expediting Rep | oort by Supplier | POX4007      | BI Publisher      | Web       | ~   | PDF       | ~      | Distribution |
|        | Expediting Ren | ort by Due Date  | POX4008      | BI Publisher      | Web       | ~   | PDF       | ~      | Distribution |

#### On the Process Scheduler Request page, select:

- Select Choose desired report (POX4008)
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

## Click the OK button Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proce    | ss List              | Serv  | er List       |                              |                    |                    |               |                        |            |                 |          |
|----------|----------------------|-------|---------------|------------------------------|--------------------|--------------------|---------------|------------------------|------------|-----------------|----------|
| View     | Process              | Requ  | est For       |                              |                    |                    |               |                        |            |                 |          |
| U<br>Run | ser ID SSI<br>Server | MITH2 | 2 Q<br>><br>> | Type<br>Name<br>Distribution | →<br>Q<br>n Status | Last<br>Instance F | rom<br>Save   | Instance To            | Days 🗸     | Refres          | h        |
| Proc     | ess List             |       |               |                              |                    |                    | Persor        | nalize   Find   View A |            | irst 🕚 1-8 of 8 | B 🕑 Last |
|          | Learning             |       | Process Ty    | De                           | Process            | User               | Run Date/Time | 9                      | Run Status | Distribution    | Details  |
| Select   | Instance             | seq.  | riocess ry    | pe -                         | Name               |                    |               |                        |            | Status          | Detuna   |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

#### Click on <u>Report Manager</u> link

#### The View Reports For page displays:

| List           | Explorer      | Administration      | Archives                             |                         |                    |        |          |         |
|----------------|---------------|---------------------|--------------------------------------|-------------------------|--------------------|--------|----------|---------|
| View Repor     | ts For        |                     |                                      |                         |                    |        |          |         |
| User ID        |               | Туре                | ✓ Last                               | ~                       | 5                  | Davs 🗸 |          | Refresh |
| Status         |               |                     |                                      | 12437262 to             | 12437262           |        |          |         |
| Status         | [             |                     |                                      |                         | 12101202           |        |          |         |
| Demont Lint    |               |                     |                                      |                         |                    |        |          |         |
|                |               |                     |                                      | I< <                    | 1-1 of 1 🗸         |        | View All | ]       |
|                | Demant        | Dree                |                                      | Domunet                 |                    |        |          |         |
| Select         | ID            | Instance            | Description                          | Date/Time               | Format             | Status | Details  |         |
|                | 5514138       | 12437262            | POX4008 - POX4008.pdf                | 01/22/2024<br>1:51:38PM | Acrobat<br>(*.pdf) | Posted | Details  |         |
| Select All     |               | Deselect All        |                                      |                         |                    |        |          |         |
| Delete         | С             | lick the delete but | ton to delete the selected report(s) |                         |                    |        |          |         |
| Go back to Pro | cess Requests |                     |                                      |                         |                    |        |          |         |
| Save           |               |                     |                                      |                         |                    |        |          |         |

#### **Click on the Administration tab**

Click on <u>POX4008 – POX4008.pdf</u> link

## Example of Report Output

| OR                         | ACLE                                  | Report ID: P<br>User ID: S<br>Run Control: R                | OX4008<br>SMITH2<br>tun_Expediting | j_Repo | orts        | EXPEDIT     | PeopleSoft Purchasi                 | DUE DAT | E   |      |     | Page No<br>Run Date<br>Run Time | • 1<br>• 1/1<br>• 9:3 | 8/2019<br>7:29 AM |
|----------------------------|---------------------------------------|---|------------------------------------|--------|-------------|-------------|-------------------------------------|---------|---|------|-----|---------------------------------|-----------------------|-------------------|
| Due Date<br>Due Date<br>BU | s Included :<br>: 08/09/2018<br>PO ID | 07/01/2018 Thru: 06/30/<br>8 Days Late : 162<br>Contract ID | 2020                               | Rel    | Buyer       | Supplier ID | Supplier Name                       | Item ID | Item Description  | Line | Sch | Ord Qty                         | UOM                   | Shipto ID         |
| 03420                      | 000006192                             | 4 000000000000000000  | 0026389                            | 67     | Lisa E Hill | 0000041897  | National<br>Medical<br>Services Inc |         | Provide<br>toxicological<br>analysis of<br>postmortem<br>specimens with<br>screening and<br>confirmation,<br>storage of<br>specimens, and<br>proper chain of<br>custody protocol. | 1    | ĩ   | 1                               | EA                    | PHEABF<br>L003    |

## VT Item Categories by Buyer (VT\_RPTPO011)

**Possible situations when this report should be run:** This report lists all the item categories by primary buyer along with the lead time days and account information.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > VT Item Categories by Buyer

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > VT Item Categories by Buyer

#### Click on the Add a New Value tab

| VT Item Categories by Buyer    |                          |
|--------------------------------|--------------------------|
| Add a New Value                | Q Find an Existing Value |
| *Run Control ID Run_VT_RPTP001 |                          |

#### **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\_VT\_RPTPO011)

#### **Click the Add Button**

#### The Items Categories by Buyer page displays:

| Item Categories by Buyer                             |                                    |
|--|------------------------------------|
| Run Control ID Run_VT_RPTP0011<br>Language English v | Report Manager Process Monitor Run |
| Report Request Parameters                            |                                    |
| *SetID: STATE Q                                      |                                    |
| Primary Buyer<br>(% for All):                        | ٩                                  |
| 🔚 Save 🔛 Notify                                      | 📑 Add 🖉 Update/Display             |

#### Enter information on the Items Categories by Buyer page:

- **SetID** Leave as default (STATE)
- **Primary Buyer** Enter the User ID; or click on magnifying glass to lookup; or enter % to select all Buyers

| Item Categories by Buyer                             |                                    |
|--|------------------------------------|
| Run Control ID Run_VT_RPTP0011<br>Language English v | Report Manager Process Monitor Run |
| Report Request Parameters                            |                                    |
| *SetID: STATE Q                                      |                                    |
| Primary Buyer [%]<br>(% for All):                    |                                    |
| Save Save  | 📑 Add 🖉 Update/Display             |

#### **Click Run button**

#### The Process Scheduler Request page displays:

| Process Scheduler Request |              |                    |                         | ×      |
|---------------------------|--------------|--------------------|-------------------------|--------|
|                           |              |                    |                         | Help   |
| User ID DBROCHU           |              | Run Control ID     | Run_VT_RPTP0011         |        |
| Server Name               | ∨ Run        | Date 01/23/2024    | 31                      |        |
| Recurrence                | ∼ Run        | Time 7:53:21AM     | Reset to Current Date/T | ime    |
| Time Zone                 |              |                    |                         |        |
| Process List              |              |                    |                         |        |
| Select Description        | Process Name | Process Type       | *Type *Format Distril   | oution |
| VT_RPTP0011               | VT_RPTP0011  | Application Engine | Web 🗸 PDF 🗸 Distril     | oution |
| OK Cancel                 |              |                    |                         |        |

#### On the Process Scheduler Request page, select:

- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

#### The Item Categories by Buyer page displays:

| Item Categories by Buyer                             |   |   |                  |
|--|---|---|------------------|
| Run Control ID Run_VT_RPTP0011<br>Language English V |   | Report Manager Process Monitor<br>Process Instance:12437272 | Run              |
| Report Request Parameters                            |   |   |                  |
| *SetID: STATE Q<br>Primary Buyer %<br>(% for All):   | Q |   |                  |
| Rave Notify  |   | Add   | 🕖 Update/Display |

#### Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proce    | ss List               | Server List |                     |                            |                 |           |                 |          |            |                        |            |              |
|----------|-----------------------|-------------|---------------------|----------------------------|-----------------|-----------|-----------------|----------|------------|------------------------|------------|--------------|
| View Pro | View Process Requests |             |                     |                            |                 |           |                 |          |            |                        |            |              |
| User     | ID DBROCI             | HU Q        | Туре                | <ul> <li>✓ Last</li> </ul> | ~               | 20 Minute | es v            | Refresh  | J          |                        |            |              |
| Serv     | /er                   | ~           | Name                | Q Instance                 | e R             | ange      | [               | Clear    | ]          |                        |            |              |
| Run S    | Status                | ~           | Distribution Status | ~                          | 🗹 Save On Refre | sh Repo   | rt Manager      | Reset    |            |                        |            |              |
|          |                       |             |                     |                            |                 |           |                 |          |            |                        |            |              |
| ~ Proce  | ss List               |             |                     |                            |                 |           |                 |          |            |                        |            |              |
| <b>F</b> | 2                     |             |                     |                            |                 |           |                 |          |            | < 1-1 of 1             | <b>~</b> > | >   View All |
| Select   | Instance              | Seq.        | Run Control ID      | Process Type               | Process Name    | User      | Run Date/Time   |          | Run Status | Distribution<br>Status | Details    | Actions      |
|          | 12437272              |             | Run_VT_RPTPO011     | Application Engine         | VT_RPTPO011     | DBROCHU   | 01/23/2024 7:53 | 21AM EST | Success    | Posted                 | Details    | ✓Actions     |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

| Report Ma                                      | anager             |                  |   |                         |                    |        |          |
|--|--------------------|------------------|---|-------------------------|--------------------|--------|----------|
| List   | Explorer           | Administratio    | n Archives                                    |                         |                    |        |          |
| View Repor<br>User ID<br>Status<br>Report List | rts For<br>DBROCHU | V Folder         | Last     Last     Instance     to             | 5 Days                  | <b>`</b>           | Refres | sh       |
|  |                    |                  |   | < < 1-3                 | 5 of 35 🗸          | > >    | View All |
| Select   | Report<br>ID       | Prcs<br>Instance | Description                                   | Request<br>Date/Time    | Format             | Status | Details  |
|  | 5514150            | 12437272         | VT_RPTPO011 - VT Item Categories by Buyer.pdf | 01/23/2024<br>7:56:07AM | Acrobat<br>(*.pdf) | Posted | Details  |

## Click on *Report Manager* link, then Click on the Administration tab

## Click on <u>VT\_RPTPO011 – VT Item Categories by Buyer.pdf</u> link

## Example of Report Output

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|               |             | State o<br>Item Categ            | of Vermont<br>gories by Buyer |         | Report Definition:<br>Page:<br>Run Date:<br>Run Time: | VTRPTPO011<br>1 of 24<br>1/23/2024<br>07:56:06 AM |
|---------------|-------------|----------------------------------|-------------------------------|---------|---|---|
| Primary Buyer | Category CD | Category Description             | Lead<br>Time<br>Days          | Account | Account Description                                   |   |
|               | 00200       | Grants                           | 0                             | 550220  | Grants  |   |
|               | BDA         | Blanket Delegation of Authorit   | ő                             | 520500  | Other General Supplies                                |   |
|               | BGS62       | BGS Postal Center                | 0                             | 135025  | Postage Inventory                                     |   |
|               | BGS67       | BGS Property Mgmt                | 0                             | 135035  | Leases Inventory                                      |   |
|               | BGS69       | BGS CIT Telecomm                 | 0                             | 135001  | Materials for Resale                                  |   |
|               | BGS70       | BGS CIT Cust Support             | Ő                             | 135001  | Materials for Resale                                  |   |
|               | BGS72       | BGS Fed. Sumlus Property         | 0                             | 135001  | Materials for Resale                                  |   |
|               | BGS73       | BGS State Surplus Property       | 0                             | 135001  | Materials for Resale                                  |   |
|               | BGSDS       | BGS Central Stores Direct Shin   | 0                             | 525310  | Cost of Direct Shin Items Sold                        |   |
|               | BGSEC       | BGS Forms - Court                | 0                             | 135001  | Materials for Resale                                  |   |
|               | BOSEP       | BGS Forms Path                   | 0                             | 135001  | Materials for Resale                                  |   |
|               | BOSIN       | BGS Inventory                    | 0                             | 137001  | Inventory Clearing Account                            |   |
|               | BGSSP       | BGS Special Order                | 0                             | 135001  | Materials for Resale                                  |   |
|               | BOSTR       | BGS Telephone Books              | 0                             | 135001  | Materials for Resale                                  |   |
|               | DIG         | Digital Printing                 | 0                             | 517000  | Drinting and Dinding                                  |   |
|               | FIN         | Einish                           | 0                             | 517000  | Printing and Dinding                                  |   |
|               | LEC         | Fillisti<br>Logialetive          | 0                             | 517000  | Printing and Binding                                  |   |
|               | MIS         | Miscellaneous                    | 0                             | 517000  | Printing and Binding                                  |   |
|               | MISCE       | Miscellaneous Expanse            | 0                             | 520500  | Other General Supplier                                |   |
| DLAROSE       | 04566       |                                  | 20                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 04570       | VACUUM CLEANERS ELECTRIC         | 20                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 045/8       | WASHERS AND DRYERS, COAR (EDGIAL | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 04392       | DADGES DUTTONS EMPLEMS           | 30                            | 520500  | Other Equipment                                       |   |
| DLAROSE       | 08010       | DADGES, DUTIONS, EMBLEMS         | 30                            | 520500  | Clath & Clathing                                      |   |
| DLAROSE       | 16502       | PATCHES, CLOTH, CAPS, SHOULDER   | 30                            | 520520  | Cloth & Clothing                                      |   |
| DLAROSE       | 16505       | DLENDERS, MIXERS, ETC.           | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 16515       | CADINEIS,COUNTERS, TADLES, ETC.  | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 16520       | DISTRUCTOR CONDUCTOR TYPE        | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10329       | DISHWASHERS, COMMERCIAL TIPE     | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10001       | DISPENSERS, ALL TIPES            | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10044       | FOOD CONTAINERS, SS/VACUUM LIPE  | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 1004/       | FOOD CARTS/CAFETERIA SERVING     | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10332       | ICE EQUIPMENT: CRUSHERS, ETC.    | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10300       | DACKS, CUR CLASS TRAN FTC        | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10008       | RACKS: CUP, GLASS, TRAT, ETC.    | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10373       | CHIVES, JAIDDLES, EIC.           | 20                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 103/9       | SINKS, SCULLER I, GALV. & SS     | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10383       | STEAM COUKERS/STM JKTD KETTLES   | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 10099       | NITCHEN EQUIP. NOT CLASSIFIED    | 30                            | 522400  | Other Equipment                                       |   |
| DLAROSE       | 1/308       | BALANCES & ACCESS, LAB           | 50                            | 522400  | Other Equipment                                       |   |
| DLARUSE       | 1/311       | CELLS & CUVETTES - PHOTO/SPEC.   | 30                            | 521810  | Medical and Lab Supplies                              |   |
| DLAROSE       | 1/014       | CHROMATOGRAPH & SPECTROMETER     | 50                            | 521810  | Medical and Lab Supplies                              |   |
| DLAROSE       | 1/528       | ELECTROPHORESIS SUPPLIES: GEL,   | 30                            | 521810  | Medical and Lab Supplies                              |   |
| DLAROSE       | 1/529       | EXTRACTION, DIGESTION & DISTIL   | 30                            | 521810  | Medical and Lab Supplies                              |   |

## Status Listings - Order Status by Item (POX4021)

**Possible situations when this report should be run:** This report provides PO status information sorted by item.

Two reports can be produced from the same run control page: Order Status by Vendor (POX4020), and Order Status by Item (POX4021).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Status Listings

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Status Listings

#### Click on the Add a New Value tab

| PO Status Listings          |                          |  |  |  |  |  |
|-----------------------------|--------------------------|--|--|--|--|--|
| Add a New Value             | Q Find an Existing Value |  |  |  |  |  |
| *Run Control ID Run_POX4021 |                          |  |  |  |  |  |

#### **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\_POX4021)

#### **Click the Add Button**

#### The Status Listings page displays:

| Status Listings                                  |                                    |
|--|------------------------------------|
| Run Control ID Run_POX4021<br>Language English v | Report Manager Process Monitor Run |
| Report Request Parameters                        |                                    |
| From Date  | Through Date                       |
| Business Unit                                    |                                    |
| Save Notify                                      | 📑 Add 🖉 Update/Display             |

#### Enter information on the Status Listing page:

- From Date Enter date; or use pop-up calendar to select
- Through Date Enter Date; or use pop-up calendar to select
- Business Unit Enter the Business unit; or use the lookup to select

| Status Listings<br>Run Control ID Run_POX4021  | Report Manager Process Monitor Run |
|--|------------------------------------|
| Report Request Parameters From Date 07/01/2023 | Through Date 12/31/2023            |
| Business Unit 01110                            |                                    |
| Save Notify                                    | 📑 Add 🖉 Update/Display             |

#### **Click Run button**

#### Process Scheduler Request × Help User ID DBROCHU Run Control ID Run\_POX4021 Server Name $\sim$ Run Date 01/23/2024 31 Run Time 8:20:13AM Recurrence Reset to Current Date/Time $\sim$ Time Zone Q Process List Distribution Select Description Process Name Process Type \*Type \*Format V PDF Order Status By Vendor POX4020 **BI Publisher** Web $\sim$ Distribution Order Status By Item V PDF **BI Publisher** Web ✓ Distribution $\checkmark$ POX4021 OK Cancel

#### The Process Scheduler Request page displays:

#### On the Process Scheduler Request page, select:

- Select Choose desired report (POX4021)
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

#### The Status Listing page displays:

| Status Listings                                  |  |
|--|--|
| Run Control ID Run_POX4021<br>Language English v | Report Manager Process Monitor Run Process Instance:12437273 |
| Report Request Parameters                        |  |
| From Date 07/01/2023                             | Through Date 12/31/2023                                      |
| Save Notify                                      | 📑 Add 🖉 Update/Display                                       |

#### Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proces    | s List S    | erver List |                  |                            |                 |            |                          |            |                        |         |              |
|-----------|-------------|------------|------------------|----------------------------|-----------------|------------|--------------------------|------------|------------------------|---------|--------------|
| View Proc | cess Reques | its        |                  |                            |                 |            |                          |            |                        |         |              |
| User I    | DBROCH      | JQ         | Туре             | <ul> <li>✓ Last</li> </ul> | ~               | 20         | Minutes v Re             | fresh      |                        |         |              |
| Serve     | er 🦲        | ~          | Name             | Q Insta                    | nce             | Range      | C                        | lear       |                        |         |              |
| Run St    | tatus       | ~          | Distribution Sta | itus                       | Save 🤇          | On Refresh | Report Manager R         | eset       |                        |         |              |
|           |             |            |                  |                            |                 |            |                          |            |                        |         |              |
| ✓ Proces  | s List      |            |                  |                            |                 |            |                          |            |                        |         |              |
| E, Q      |             |            |                  |                            |                 |            |                          |            | < < 1-1 of             | 1 ~ >   | >   View All |
| Select    | Instance    | Seq.       | Run Control ID   | Process Type               | Process<br>Name | User       | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions      |
|           | 12437273    |            | Run_POX4021      | BI Publisher               | POX4021         | DBROCHU    | 01/23/2024 8:20:13AM EST | Success    | Posted                 | Details | ∼Actions     |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

#### Click on <u>Report Manager</u> link

#### **Click on the Administration tab**

| List        | Explorer     | Adminis          | stration | Archives      |          |   |                         |                    |        |          |         |
|-------------|--------------|------------------|----------|---------------|----------|---|-------------------------|--------------------|--------|----------|---------|
| View Repo   | DBROCH       |                  | Funo     |               | v last   |   | ] [                     | 5 Days             |        | [        | Refrech |
| Status      |              | Y Fo             | lder     | ~             | Instance |   | to                      |                    |        |          |         |
| Report List |              |                  |          |               |          | K | < 1-36 of               | 36 🗸 >             | >      | View All |         |
| Select      | Report<br>ID | Prcs<br>Instance | Descript | ion           |          |   | Request<br>Date/Time    | Format             | Status | Details  |         |
|             | 5514152      | 12437273         | POX4021  | - POX4021.pdf |          |   | 01/23/2024<br>8:21:24AM | Acrobat<br>(*.pdf) | Posted | Details  |         |

## Click on <u>POX4021 – POX4021.pdf</u> link

#### Example of Report Output

| ORA                         | ACLE.                  | Report ID:<br>User ID:<br>Run Control: | POX4021<br>DBROCHU<br>Run POX402 | 1  | People Soft Pure                        | chasing |      |      |         |     |      |        | Page<br>Run I<br>Run 1 | No.<br>Date<br>Time | 1<br>1/23/2024<br>5:21:24 AM |
|-----------------------------|------------------------|--|----------------------------------|--|---|---------|------|------|---------|-----|------|--------|------------------------|---------------------|------------------------------|
|                             |                        |  |                                  |  | ORDER STATU                             | S BY IT | EM   |      |         |     |      |        |                        |                     |                              |
| Due Dates in<br>Business Un | cluded:<br>It:         | 7/1/2023<br>01110                      | Thru:                            | 12/31/2023   |   |         |      |      |         |     |      |        |                        |                     |                              |
| Item ID                     |                        | item Descrip                           | tion                             |  | Contract ID                             | Rel     | Line | Schd | Ord Qty | UOM | Curr | Price  | Ord Amt                | Due Date            | Shipto ID                    |
|                             |                        | Statewide Vo                           | ice over IP Servic               | 85   |   |         |      |      |         |     |      |        |                        |                     |                              |
| Supplier ID:<br>PO ID:      | 000034421<br>000000106 | 37 t<br>3 PO D                         | Name:<br>t: 7/11/2023            | NWN Corporation<br>Dispatched Buyer: Alicia R Hill   | 000000000000000000000000000000000000000 | 7065    | 1    | 1    | 1.00    | EA  | USD  | 20.72  | 20.72                  | 7/11/2023           | PADMMTP001                   |
|                             |                        | Test CYB UO                            | м                                |  |   |         |      |      |         |     |      |        |                        |                     |                              |
| Supplier ID:<br>PO ID:      | 000000000              | 08 1<br>5 POD                          | Name:<br>t: 12/27/2023           | Deerfield Valley News<br>Open Buyer: Jamie A Sheltra | 00000000000000000046464                 | 2       | 2    | 1    | 1.00    | СҮВ | USD  | 1.00   | 1.00                   | 12/27/2023          | PFMMTP002                    |
|                             |                        | Test PPM UC                            | м                                |  |   |         |      |      |         |     |      |        |                        |                     |                              |
| Supplier ID:<br>PO ID:      | 000000000              | 08 1<br>5 POD                          | Name:<br>t: 12/27/2023           | Deerfield Valley News<br>Open Buyer: Jamie A Sheltra | 000000000000000000046464                | 1       | 1    | 1    | 1.00    | PPM | USD  | 1.00   | 1.00                   | 12/27/2023          | PFMMTP002                    |
|                             |                        | ePro SaaS                              |                                  |  |   |         |      |      |         |     |      |        |                        |                     |                              |
| Supplier ID:<br>PO ID:      | 00003805<br>000000106  | 34 M<br>4 POD                          | Name:<br>t: 7/26/2023            | Nalua Inc.<br>Dispatched Buyer: Alicia R Hill        | 0000000000000000000000039128            | 7       | 1    | 1    | 1.00    | EA  | USD  | 962.50 | 962.50                 | 7/26/2023           | PADMMTP001                   |

## Status Listings - Order Status by Supplier (POX4020)

**Possible situations when this report should be run:** This report provides PO status information sorted by supplier.

Two reports can be produced from the same run control page: Order Status by Vendor (POX4020), and Order Status by Item (POX4021).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Status Listings

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Status Listings

#### Click on the Add a New Value tab

| PO Status Listings          |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| *Run Control ID Run_POX4020 |                          |

#### **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\_POX4020)

#### **Click the Add Button**

#### The Status Listings page displays:

| Status Listings            |                                    |  |  |  |  |  |
|----------------------------|------------------------------------|--|--|--|--|--|
| Run Control ID Run_POX4020 | Report Manager Process Monitor Run |  |  |  |  |  |
| Language English v         |                                    |  |  |  |  |  |
| Report Request Parameters  |                                    |  |  |  |  |  |
| From Date                  | Through Date                       |  |  |  |  |  |
| Business Unit              |                                    |  |  |  |  |  |
|                            |                                    |  |  |  |  |  |
| Save Notify                | 📑 Add 🗾 Update/Display             |  |  |  |  |  |

#### Enter information on the Status Listing page:

- From Date Enter date; or use pop-up calendar to select
- Through Date Enter Date; or use pop-up calendar to select
- Business Unit Enter the Business unit; or use the lookup to select

| Status Listings            |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4020 | Report Manager Process Monitor Run |
| Language English 🗸         |                                    |
| Report Request Parameters  |                                    |
| From Date 07/01/2023       | Through Date 12/31/2023            |
| Business Unit 01110        |                                    |
| Save Notify                | 📑 Add 🖉 Update/Display             |

#### Click Save button. Click Run button.

#### The Process Scheduler Request page displays:

| Proce  | ss Scheduler   | Request   |              |                 |             |                 |              |    |
|--------|----------------|-----------|--------------|-----------------|-------------|-----------------|--------------|----|
|        |                |           |              |                 |             |                 |              | He |
|        | User ID        | DBROCHU   |              | Run Control ID  | Run_POX4020 | )               |              |    |
|        | Server Name    |           | ∼ Rur        | Date 01/23/2024 | 31          |                 |              |    |
|        | Recurrence     | [         | ✓ Run        | Time 8:52:45AM  | R           | leset to Curren | t Date/Time  |    |
|        | Time Zone      | Q         |              |                 |             |                 |              |    |
| Proce  | ss List        |           |              |                 |             |                 |              |    |
| Select | Description    |           | Process Name | Process Type    | *Type       | *Format         | Distribution |    |
|        | Order Status E | By Vendor | POX4020      | Bl Publisher    | Web 🗸       | PDF v           | Distribution |    |
|        | Order Status E | By Item   | POX4021      | Bl Publisher    | Web 🗸       | PDF v           | Distribution |    |
| OK     | Canc           | el        |              |                 |             |                 |              |    |

#### On the Process Scheduler Request page, select:

- Select Choose desired report (POX4020)
- **Type** Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**
## The Status Listing page displays:

| Status Listings            |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4020 | Report Manager Process Monitor Run |
| Language English 🗸         | Process Instance:12437274          |
| Report Request Parameters  |                                    |
| From Date 07/01/2023       | Through Date 12/31/2023            |
| Business Unit 01110        |                                    |
| Save E Notify              | 📑 Add 🛛 🖉 Update/Display           |

### Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proces   | as List S   | Server List |                  |              |                 |            |                          |       |            |                        |         |            |
|----------|-------------|-------------|------------------|--------------|-----------------|------------|--------------------------|-------|------------|------------------------|---------|------------|
| View Pro | cess Reques | sts         |                  |              |                 |            |                          |       |            |                        |         |            |
| User     |             | υQ          | Туре             | ✓ Last       | ~               | 20         | Minutes ~                | Refre | sh         |                        |         |            |
| Serv     | er          | ~           | Name             | Q Insta      | nce             | Range      |                          | Clea  | r          |                        |         |            |
| Run S    | tatus       | ~           | Distribution Sta | itus         | 🖌 🔽 Save        | On Refresh | Report Manager           | Rese  | et         |                        |         |            |
|          |             |             |                  |              |                 |            |                          |       |            |                        |         |            |
| ~ Proces | s List      |             |                  |              |                 |            |                          |       |            |                        |         |            |
|          | r           |             |                  |              |                 |            |                          |       |            | < 1-1 of               | 1 🗸 🚿   | > View All |
| Select   | Instance    | Seq.        | Run Control ID   | Process Type | Process<br>Name | User       | Run Date/Time            |       | Run Status | Distribution<br>Status | Details | Actions    |
|          | 12437274    |             | Run_POX4020      | BI Publisher | POX4020         | DBROCHU    | 01/23/2024 8:52:45AM EST | Г     | Success    | Posted                 | Details | ✓Actions   |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

## Click on <u>Report Manager</u> link

#### **Click on the Administration tab**

| List        | Explorer           | Adminis          | stration  | Archives      |          |     |   |                         |                    |        |          |         |
|-------------|--------------------|------------------|-----------|---------------|----------|-----|---|-------------------------|--------------------|--------|----------|---------|
| View Repo   | orts For<br>DBROCH | п т              | Туре      |               | ~ L      | ast | ~ | [                       | 5 Days             | ~      |          | Refresh |
| Status      |                    | Y Fol            | lder      | ~             | Instance |     |   | to                      |                    |        |          |         |
| Report List |                    |                  |           |               |          |     | < | < 1-37 of               | 37 🗸 >             | >      | View All |         |
| Select      | Report<br>ID       | Prcs<br>Instance | Descripti | on            |          |     |   | Request<br>Date/Time    | Format             | Status | Details  |         |
|             | 5514 <b>1</b> 54   | 12437274         | POX4020   | - POX4020.pdf |          |     |   | 01/23/2024<br>8:54:10AM | Acrobat<br>(*.pdf) | Posted | Details  |         |

## Click on <u>POX4020 – POX4020.pdf</u> link

## Example of Report Output

| c    | DRACLE                       | Report ID:<br>User ID:<br>Run Control: | POX4020<br>DBROCHU<br>Run_POX4020 |               | PeopleSoft Purchasing<br>ORDER STATUS BY SUPPLIER |                |                 |      |      |           |     |      |           |            | 1<br>1/23/2024<br>5:54:10 AM |
|------|------------------------------|--|-----------------------------------|---------------|---|----------------|-----------------|------|------|-----------|-----|------|-----------|------------|------------------------------|
| Due  | Dates Included:              | 7/1/2023                               | Thru: 12                          | 31/2023       |   |                |                 |      |      |           |     |      |           |            |                              |
| Busi | Contra                       | ot ID                                  |                                   | Item ID       | Item  | Description    |                 | Line | Schd | Order Qty | UOM | Curr | Order Amt | Due Date   | Shipto ID                    |
| Supp | lier ID: 00000000            | 08                                     | Name:                             | Deerfield Val | ley News  |                |                 |      |      |           |     |      |           |            |                              |
| P    | O ID: 000000108              | 5 Date:                                | 12/27/2023                        | PO Status:    | Open  | Buyer:         | Jamie A Sheltra |      |      |           |     |      |           |            |                              |
|      | 00000000                     | 000000000046464                        |                                   |               | Test F  | PPM UOM        |                 | 1    | 1    | 1.00      | PPM | USD  | 1.00      | 12/27/2023 | PFMMTP002                    |
|      | 00000000                     | 000000000046464                        |                                   |               | Test (  | CYB UOM        |                 | 2    | 1    | 1.00      | CYB | USD  | 1.00      | 12/27/2023 | PFMMTP002                    |
| Supp | lier ID: 00003442            | 87                                     | Name:                             | NWN Corpor    | ation   |                |                 |      |      |           |     |      |           |            |                              |
| P    | O ID: 000000108              | 3 Date:                                | 7/11/2023                         | PO Status:    | Dispatched  | Buyer:         | Alicia R Hill   |      |      |           |     |      |           |            |                              |
|      | 00000000                     | 000000000042577                        |                                   |               | State   | wide Voice ov  | er IP Services  | 1    | 1    | 1.00      | EA  | USD  | 20.72     | 7/11/2023  | PADMMTP00<br>1               |
| Supp | lier ID: 00003805            | 34                                     | Name:                             | Ivalua Inc.   |   |                |                 |      |      |           |     |      |           |            |                              |
| P    | O ID: 000000108<br>000000000 | 4 Date:<br>000000000039128             | 7/28/2023                         | PO Status:    | Dispatched<br>ePro                                | Buyer:<br>SaaS | Alicia R Hill   | 1    | 1    | 1.00      | EA  | USD  | 962.50    | 7/26/2023  | PADMMTP00                    |

## Detail Listings - PO Detail Listing by PO Date/ by Supplier ID/ or by Buyer

**Possible situations when this report should be run:** This report is used to monitor and review PO detail data by supplier.

Three reports can be produced from the same run control page: PO Detail Listing by PO Date (POX4030), PO Detail Listing by Vendor ID (POX4031), PO Detail Listing by Buyer (POX4032).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Detail Listings

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Detail Listings

#### Click on the Add a New Value tab

| PO Detail Listings                    |                          |
|---------------------------------------|--------------------------|
| Add a New Value                       | Q Find an Existing Value |
| *Run Control ID PO_Detail_Listing Add |                          |

#### **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\_POX403X)

#### **Click the Add Button**

#### The Detail Listings page displays:

| Run Co<br>La              | ontrol ID Run_PO_Detail_Listing |              | Report Manager | Process Monitor | Run         |
|---------------------------|---------------------------------|--------------|----------------|-----------------|-------------|
| Report Request Parameters | 3                               |              |                |                 |             |
| From Date                 | 81                              | Through Date | 31             |                 |             |
| Business Unit             | Q                               |              |                |                 |             |
| Supplier SetID            | Q                               |              |                |                 |             |
| Supplier ID               | Q                               |              |                |                 |             |
| Buyer                     | Q                               |              |                |                 |             |
|                           |                                 |              |                |                 |             |
| Save 🔚 Notify             |                                 |              |                | Add 🛛 🔰 Upda    | ite/Display |

#### Enter information on the Detail Listings page:

- From Date Enter the From Date; or use pop-up calendar to select
- Through Date Enter the Through Date; or use pop-up calendar to select
- Business Unit Enter the Business unit; or use the magnifying glass to lookup
- Supplier SetID Default is STATE
- Supplier ID Enter Supplier ID; or use the magnifying glass to lookup; or leave blank
- **Buyer** Enter buyer or use the lookup to select or leave blank to display all supplier IDs for selected report parameters

| Detail Listings                  |                                    |
|----------------------------------|------------------------------------|
| Run Control ID PO_Detail_Listing | Report Manager Process Monitor Run |
| Language English 🗸               |                                    |
| Report Request Parameters        |                                    |
| From Date 07/01/2019             | Through Date 12/31/2023            |
| Business Unit 02140              |                                    |
| Supplier SetID STATE             |                                    |
| Supplier ID 0000041897           |                                    |
| Buyer                            |                                    |
|                                  |                                    |
| Save Notify                      | 📑 Add 🛛 🖉 Update/Display           |

#### Click Save button. Click Run button.

#### The Process Scheduler Request page displays:

| Process Sch        | neduler Request          |              |                    |                |                 |              |  |
|--------------------|--------------------------|--------------|--------------------|----------------|-----------------|--------------|--|
|                    |                          |              |                    |                |                 |              |  |
| L. L.              | User ID DBROCHU          |              | Run Control ID     | PO_Detail_List | ing             |              |  |
| Server             | r Name                   | ~ Ri         | In Date 01/23/2024 | 81             |                 |              |  |
| Recu               | Irrence                  | ~ Ru         | n Time 9:12:40AM   | Re             | eset to Current | Date/Time    |  |
| Tim                | ne Zone 🔍 🔍              |              |                    |                |                 |              |  |
| Process List       |                          |              |                    |                |                 |              |  |
| Select Description | ption                    | Process Name | Process Type       | *Туре          | *Format         | Distribution |  |
| PO Dei             | tail Listing By PO Date  | POX4030      | BI Publisher       | Web 🗸          | PDF v           | Distribution |  |
| PO Def             | tail Listing By Supplier | POX4031      | BI Publisher       | Web 🗸          | PDF v           | Distribution |  |
| V PO Det           | tail Listing By Buyer    | POX4032      | BI Publisher       | Web 🗸          | PDF v           | Distribution |  |
| ОК                 | Cancel                   |              |                    |                |                 |              |  |

## On the Process Scheduler Request page, select:

- Select Choose desired report (Chose one or chose all three)
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

### Click the OK button

#### The Detail Listing page displays:

| Detail Listings                  |                                     |
|----------------------------------|-------------------------------------|
| Run Control ID PO_Detail_Listing | Report Manager Process Monitor Run  |
| Language English 🗸               | Process                             |
|                                  | Instance:12437275,12437276,12437277 |
| Report Request Parameters        |                                     |
| From Date 07/01/2019             | Through Date 12/31/2023             |
| Business Unit 02140              |                                     |
| Supplier SetID STATE             |                                     |
| Supplier ID 0000041897 Q         |                                     |
| Buyer                            |                                     |
|                                  |                                     |
| Save Notify                      | 📑 Add 🛛 🖉 Update/Display            |

## Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proce                             | ss List  | Server List |                   |              |                 |         |                          |            |                        |         |              |  |  |  |
|-----------------------------------|--|-------------|-------------------|--------------|-----------------|---------|--------------------------|------------|------------------------|---------|--------------|--|--|--|
| View Pro<br>User<br>Serv<br>Run S | iew Process Requests User ID DBROCHU Q Type V Last V 20 Minutes Refresh Server V Name Q Instance Range Clear Run Status V Distribution Status V Save On Refresh Report Manager Reset  Process List |             |                   |              |                 |         |                          |            |                        |         |              |  |  |  |
|                                   | 2  |             |                   |              |                 |         |                          |            | < < 1-3 of 3           | 3 ~ >   | >   View All |  |  |  |
| Select                            | Instance   | Seq.        | Run Control ID    | Process Type | Process<br>Name | User    | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions      |  |  |  |
|                                   | 12437277   |             | PO_Detail_Listing | BI Publisher | POX4032         | DBROCHU | 01/23/2024 9:12:40AM EST | Success    | Posted                 | Details | ✓Actions     |  |  |  |
|                                   | 12437276   |             | PO_Detail_Listing | BI Publisher | POX4031         | DBROCHU | 01/23/2024 9:12:40AM EST | Success    | Posted                 | Details | ✓Actions     |  |  |  |
|                                   | 12437275   |             | PO_Detail_Listing | BI Publisher | POX4030         | DBROCHU | 01/23/2024 9:12:40AM EST | Success    | Posted                 | Details | ✓Actions     |  |  |  |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

## Click on <u>Report Manager</u> link

#### Click on the Administration tab

| Report N    | lanager      |                  |           |                            |   |                         |                    |          |          |         |
|-------------|--------------|------------------|-----------|----------------------------|---|-------------------------|--------------------|----------|----------|---------|
| List        | Explorer     | Adminis          | stration  | Archives                   |   |                         |                    |          |          |         |
| View Repo   | orts For     |                  |           |                            |   |                         |                    |          |          |         |
| User ID     | DBROCH       | IU I             | Гуре      | <ul> <li>✓ Last</li> </ul> | ~ |                         | 5 Days             | ~        |          | Refresh |
| Status      | ;            | ~ Fo             | lder      | ✓ Instance                 |   | to                      |                    |          |          |         |
|             |              |                  |           |                            |   |                         |                    |          |          |         |
| Report List |              |                  |           |                            |   |                         |                    |          |          |         |
| E, Q        |              |                  |           |                            | < | < 1-40 of               | 40 ~               | $\geq  $ | View All |         |
| Select      | Report<br>ID | Prcs<br>Instance | Descripti | on                         |   | Request<br>Date/Time    | Format             | Status   | Details  |         |
|             | 5514160      | 12437277         | POX4032   | - POX4032.pdf              |   | 01/23/2024<br>9:13:58AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |
|             | 5514159      | 12437275         | POX4030   | - POX4030.pdf              |   | 01/23/2024<br>9:13:57AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |
|             | 5514158      | 12437276         | POX4031   | - POX4031.pdf              |   | 01/23/2024<br>9:13:57AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |

## Click on each link <u>POX403X – POX403X.pdf</u> link to review your report.

## Example of Report Output(s):

### PO Detail Listing by PO Date

| ORAC                        | 'L€' Rep<br>Use<br>Run      | ort ID:<br>r ID:<br>Control: | POX4030<br>DBROCH<br>PO_Deta | HU<br>ail_Listin | ng      | POE                         | PeopleSoft<br>DETAIL LISTI | Purchasin<br>NG BY F | 9<br>PO DATE |     |     | 5   | Page No. 1<br>Run Date 1/23/2024<br>Run Time 9:13:57 AM |     |
|-----------------------------|-----------------------------|------------------------------|------------------------------|------------------|---------|-----------------------------|----------------------------|----------------------|--------------|-----|-----|---|---|-----|
| PO Dates Inc<br>Business Un | luded: 07/01/2<br>it: 02140 | 2019 Thru:                   | 1                            | 12/31/20         | 23      |                             |                            |                      |              |     |     |   |   |     |
| PO Date                     | PO ID                       | Supplier Id                  | Line                         | Schd             | Item ID | Item Description            | Supplier Item              | Catgry               | Order Qty    | UOM | CUR | Price Contract                            | Line  | Rel |
| 07/21/2023                  | 0000053389                  | 000004189                    | 71                           | 1                |         | blood toxicology<br>testing |                            | 00001                | 1            | EA  | USD | 358.00 0000000000000000000000000000000000 | 39535 1   | 78  |

## PO Detail Listing by Supplier

| OR                              | ORACLE Report ID: POX4031<br>User ID: DBROCHU<br>Run Control: PO_Detail_Listing |                               |      |      |           |                             | Peo<br>PO DETAIL | pleSoft Pu<br>LISTINC | Irchasing<br>BY SUPPLI | ER  |       |        | 7<br>7<br>7             | Page No. 1<br>Run Date 1/23/2024<br>Run Time 9:13:56 AM | I   |
|---------------------------------|---|-------------------------------|------|------|-----------|-----------------------------|------------------|-----------------------|------------------------|-----|-------|--------|-------------------------|---|-----|
| PO Dates<br>Supplier Supplier I | Included: 07/0<br>Setid: STA<br>D: 0000   | 1/2019 Thru:<br>TE<br>0041897 |      | 12   | 2/31/2023 |                             |                  |                       |                        |     |       |        |                         |   |     |
| BU                              | PO ID   | PO Date                       | Line | Schd | Item ID   | Item Description            | Supplier Item    | Catgry                | Order Qty              | UOI | U CUR | Price  | Contract                | Line  | Rel |
| 02140                           | 0000053389  | 07/21/2023                    | 1    | 1    |           | blood toxicology<br>testing |                  | 00001                 | 1                      | EA  | USD   | 358.00 | 00000000000000000000039 | 9535 1  | 78  |

## PO Detail Listing by Buyer

Г

| OR                 | ACLE.                      | Report ID:<br>User ID:<br>Run Control: | POX4032<br>DBROCHU<br>PO_Detail | J<br>_Listin | g    |         | POI                         | PeopleSoft F<br>DETAIL LIST | Purchasing | BUYER     |     |     |        |   | Page No. 1<br>Run Date 1/23/202<br>Run Time 9:13:58 | 4<br>AM |     |
|--------------------|----------------------------|--|---------------------------------|--------------|------|---------|-----------------------------|-----------------------------|------------|-----------|-----|-----|--------|---|---|---------|-----|
| PO Dates<br>Buyer: | Included: 07/<br>Eric Kenn | 01/2019 Thr<br>eth Brooks              | ru: 12/31/2023                  |              |      |         |                             |                             |            |           |     |     |        |   |   |         |     |
| BU                 | PO ID                      | PO Date                                | Suplier ID                      | Line         | Schd | Item ID | Item Description            | Supplier Item               | Catgry     | Order Qty | UOM | CUR | Price  | Contract                                |   | Line    | Rel |
| 02140              | 0000053389                 | 07/21/2023                             | 0000041897                      | 1            | 1    |         | blood toxicology<br>testing | 1                           | 00001      | 1         | EA  | USD | 358.00 | 000000000000000000000000000000000000000 | 0000039535  | 1       | 78  |

## Listings - PO Listing by PO Date/ by Supplier ID/ by Buyer/ or by Status

**Possible situations when this report should be run:** This report is used to monitor and review PO data by buyer.

Four Reports can be produced from the same run control page: PO Listing by PO Date (POX4010), PO Listing by Supplier ID (POX4011), PO Listing by Buyer (POX4012), and PO Listing by PO Status (POX4013).

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Listings

**Navigator Menu navigation:** Purchasing > Purchase Orders > Reports > Listings

#### Click on the Add a New Value tab

| PO Listings                    |                          |
|--------------------------------|--------------------------|
| Add a New Value                | Q Find an Existing Value |
| *Run Control ID Run_PO_Listing |                          |

#### **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\_POX401X)

#### Click the Add Button. The Listings page displays:

| Listings              |                           |   |                                    |
|-----------------------|---------------------------|---|------------------------------------|
| Run                   | Control ID Run_PO_Listing |   | Report Manager Process Monitor Run |
|                       | Language English 🗸 🗸      |   |                                    |
| Report Request Parame | eters                     |   |                                    |
| Business Unit         | Q                         |   |                                    |
| From Date             | ii)                       |   | Through Date                       |
| Supplier SetID        | ٩                         |   |                                    |
| Supplier ID           | Q                         |   |                                    |
| Buyer                 |                           | Q |                                    |
| PO Status             |                           | ~ |                                    |
|                       |                           |   |                                    |
| Save E Notify         |                           |   | 📑 Add 🖉 Update/Display             |

## Enter information on the Listings page:

- **Business Unit** Enter the Business unit; or use the magnifying glass to lookup; or leave blank
- From Date Enter the From Date; or use pop-up calendar to select
- Through Date Enter the Through Date; or use pop-up calendar to select
- Supplier SetID Default is STATE
- **Supplier ID** Enter the Supplier ID; or use the magnifying glass to lookup; or leave blank
- **Buyer** Enter the Buyer; or use the magnifying glass to lookup; or leave blank
- **PO Status** Use the dropdown menu to select

| Listings                      |                          |                       |             |
|-------------------------------|--------------------------|-----------------------|-------------|
| Run Control ID Run_PO_Listing | Report Manager           | Process Monitor       | Run         |
| Language English 🗸            |                          | Process               |             |
|                               | Instance:12437278,124372 | 279,12437280,12437281 |             |
| Report Request Parameters     |                          |                       |             |
| Business Unit 02170           |                          |                       |             |
| From Date 07/01/2019          | Through Date 12/31/2023  | 31                    |             |
| Supplier SetID STATE          |                          |                       |             |
| Supplier ID 0000041897 Q      |                          |                       |             |
| Buyer                         |                          |                       |             |
| PO Status Dispatched V        | )                        |                       |             |
| Save Notify                   |                          | 📑 Add 🛛 🖉 Upda        | ate/Display |

#### Click Run button.

#### The Process Scheduler Request page displays:

| Proce   | ess Scheduler Request |              |                    |              |                |              | ×    |
|---|-----------------------|--------------|--------------------|--------------|----------------|--------------|------|
|   |                       |              |                    |              |                |              | Help |
|   | User ID DBROCHU       |              | Run Control ID     | Run_PO_Listi | ng             |              |      |
|   | Server Name           | ✓ Ri         | In Date 01/23/2024 | 31           |                |              |      |
|   | Recurrence            | √ Ru         | n Time 10:41:05AM  | R            | eset to Curren | t Date/Time  |      |
|   | Time Zone             |              |                    |              |                |              |      |
| Proce   | ess List              |              |                    |              |                |              |      |
| Select  | Description           | Process Name | Process Type       | *Type        | *Format        | Distribution |      |
| <ul><li>✓</li></ul>   | PO Listing by PO Date | POX4010      | BI Publisher       | Web 🗸        | PDF v          | Distribution |      |
| ✓   | PO Listing by Vendor  | POX4011      | BI Publisher       | Web 🗸        | PDF v          | Distribution |      |
| <ul> <li>Image: A set of the set of the</li></ul> | PO Listing by Buyer   | POX4012      | BI Publisher       | Web 🗸        | PDF v          | Distribution |      |
|   | PO Listing By Status  | POX4013      | BI Publisher       | Web 🗸        | PDF v          | Distribution |      |
| Oł  | Cancel                |              |                    |              |                |              |      |

#### On the Process Scheduler Request page, select:

- Select Choose one or ALL desired report9s) (POX401X)
- **Type** Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### Click the OK button

#### Click the *Process Monitor* link. The Process List page displays:

| Proc                          | ess List    | Server List |                |               |                            |                           |                         |                         |            |                        |         |              |
|-------------------------------|-------------|-------------|----------------|---------------|----------------------------|---------------------------|-------------------------|-------------------------|------------|------------------------|---------|--------------|
| View Pro<br>Use<br>Ser<br>Run | ocess Reque | HUQ<br>v    | Type           | Q Inst<br>tus | v [<br>tance<br>v ☑ Save 0 | 20<br>Range<br>Dn Refresh | Minutes  V              | Refres<br>Clear<br>Rese | h<br>t     |                        |         |              |
|                               |             |             |                |               |                            |                           |                         |                         |            | < 1-4 of               | 4 🗸 🚿   | >   View All |
| Select                        | Instance    | Seq.        | Run Control ID | Process Type  | Process<br>Name            | User                      | Run Date/Time           |                         | Run Status | Distribution<br>Status | Details | Actions      |
|                               | 12437281    |             | Run_PO_Listing | BI Publisher  | POX4013                    | DBROCHU                   | 01/23/2024 10:41:05AM E | ST                      | Success    | Posted                 | Details | ✓Actions     |
|                               | 12437280    |             | Run_PO_Listing | BI Publisher  | POX4012                    | DBROCHU                   | 01/23/2024 10:41:05AM E | ST                      | Success    | Posted                 | Details | ∽Actions     |
|                               | 12437279    |             | Run_PO_Listing | BI Publisher  | POX4011                    | DBROCHU                   | 01/23/2024 10:41:05AM E | ST                      | Success    | Posted                 | Details | ∽Actions     |
|                               | 12437278    |             | Run_PO_Listing | BI Publisher  | POX4010                    | DBROCHU                   | 01/23/2024 10:41:05AM E | ST                      | Success    | Posted                 | Details | ✓Actions     |

### Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

#### Click on **Report Manager** link, then Click on the Administration tab

| Report M   | lanager      |                  |          |               |        |                          |                    |          |          |         |
|------------|--------------|------------------|----------|---------------|--------|--------------------------|--------------------|----------|----------|---------|
| List       | Explorer     | Adminis          | stration | Archives      |        |                          |                    |          |          |         |
| View Rep   | orts For     |                  |          |               |        |                          |                    |          |          |         |
| User II    |              | IU T             | Туре     | ~             | Last v |                          | 5 Days             | ; ~      |          | Refresh |
| Statu      | 5            | ~ Fo             | lder     | ∽ Instan      | ce     | to                       |                    |          |          |         |
|            |              |                  |          |               |        |                          |                    |          |          |         |
| Report Lis | t            |                  |          |               |        |                          |                    |          |          |         |
| E, Q       | ]            |                  |          |               | K      | < 1-38 c                 | of 38 🗸 >          | $\geq  $ | View All |         |
| Select     | Report<br>ID | Prcs<br>Instance | Descript | ion           |        | Request<br>Date/Time     | Format             | Status   | Details  |         |
|            | 5514168      | 12437279         | POX4011  | - POX4011.pdf |        | 01/23/2024<br>10:42:07AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |
|            | 5514167      | 12437280         | POX4012  | - POX4012.pdf |        | 01/23/2024<br>10:42:02AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |
|            | 5514166      | 12437281         | POX4013  | - POX4013.pdf |        | 01/23/2024<br>10:42:01AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |
|            | 5514165      | 12437278         | POX4010  | - POX4010.pdf |        | 01/23/2024<br>10:42:01AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |

Click on <u>POX401 - POX401 .pdf</u> link

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## Example of Report Output(s):

## PO Listing by Date

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| ORACL                                       | E Report ID<br>User ID:<br>Run Con | o: POX4010<br>SSMITH2<br>trol: Run_PO_Listing |     |                 | Peop<br>PO LIS             | pleSoft Purchasing<br>TING BY PO D | ATE                              |            |      | R   | age No.<br>un Date<br>un Time | 1<br>1/18/2019<br>10:44:56 AM |
|---|------------------------------------|---|-----|-----------------|----------------------------|------------------------------------|----------------------------------|------------|------|-----|-------------------------------|-------------------------------|
| PO Dates Inclu<br>Business Unit:<br>PO Date | ded : 07/01/201<br>02140<br>PO ID  | 8 Thru: 06/30/2019<br>Contract ID             | Rel | Change<br>Order | Buyer                      | Supplier Id                        | Name                             | PO Status  | Hold | Rcv | Curr                          | Amount                        |
| 08/29/2018                                  | 0000041146                         | 00000000000000000033153                       | 20  | 0               | Jordan Black-<br>Deegan    | 0000041897                         | National Medical Services<br>Inc | Dispatched | N    | Ν   | USD                           | 6,090.00                      |
| 10/03/2018                                  | 0000041437                         | 00000000000000000033153                       | 21  | 0               | Angelo Thomas<br>Filippone | 0000041897                         | National Medical Services<br>Inc | Dispatched | Ν    | N   | USD                           | 9,130.00                      |
| 10/11/2018                                  | 0000041514                         | 00000000000000000033153                       | 22  | 0               | Angelo Thomas<br>Filippone | 0000041897                         | National Medical Services        | Dispatched | Ν    | Ν   | USD                           | 514.00                        |
| 10/16/2018                                  | 0000041540                         | 000000000000000000033153                      | 23  | 0               | Angelo Thomas<br>Filippone | 0000041897                         | National Medical Services<br>Inc | Dispatched | N    | N   | USD                           | 7,812.00                      |

## PO Listing by Supplier

| OR   | ACLE Re<br>Us<br>Ru                             | eport ID:<br>ser ID:<br>in Control:                       | POX4011<br>SSMITH2<br>Run_PO_Listing |                 |                                |   | PeopleSoft Purchasing<br>PO LISTING BY SUPPLI                                      | ER                        |                          |   |                |                    |                           | Page No.<br>Run Date<br>Run Time | 1<br>1/18/2019<br>10:52:43 AM           |
|--|---|---|--------------------------------------|-----------------|--------------------------------|---|--|---------------------------|--------------------------|---|----------------|--------------------|---------------------------|----------------------------------|---|
| PO Dates Included: 07/01/2018 Thru: 06/30/2019<br>Supplier SetID: STATE<br>Supplier ID, Name: 0000041897 National Medical Services Inc<br>Change |   |   |                                      |                 |                                |   |  |                           |                          |   |                |                    |                           |                                  |   |
| Supplier<br>BU   | PO ID   | 0000041897<br>Contract                                    | National Medical Service             | Rel             | Change<br>Order                | PO Date   | Buyer  | Dis<br>Act                | spatch<br>Meth           | PO Status   | Hold           | Rcv                | Curr                      |                                  | Amoun                                   |
| Supplier<br>BU   | POID  | 0000041897<br>Contract                                    | National Medical Service             | Rel             | Change<br>Order                | PO Date   | Buyer  | Dis<br>Act                | spatch<br>Meth           | PO Status   | Hold           | Rcv                | Curr                      |                                  | Amoun                                   |
| Supplier<br>BU<br>)2140  | PO ID<br>0000041146                             | 0000041897<br>Contract 1<br>0000000                       | National Medical Service             | Rel             | Change<br>Order<br>0           | PO Date<br>08/29/2018                             | Buyer<br>Jordan Black-Deegan   | <u>Dis</u><br>Act         | spatch<br>Meth<br>PRN    | PO Status   | Hold<br>N      | Rcv                | Curr                      | 8                                | Amoun<br>6,090.00                       |
| Supplier<br>30<br>02140<br>02140   | PO ID<br>0000041146<br>0000041437               | 0000041897<br>Contract I<br>0000000<br>0000000            | National Medical Service             | Rel<br>20<br>21 | Change<br>Order<br>0<br>0      | PO Date<br>08/29/2018<br>10/03/2018               | Buyer<br>Jordan Black-Deegan<br>Angelo Thomas Filippone                            | Act<br>Y<br>Y             | Meth<br>PRN<br>PRN       | PO Status<br>Dispatched<br>Dispatched               | Hold<br>N<br>N | Rcv<br>N<br>N      | Curr<br>USD<br>USD        |                                  | Amoun<br>6,090.00<br>9,130.00           |
| Supplier<br>BU<br>02140<br>02140<br>02140  | PO ID<br>0000041146<br>0000041437<br>0000041514 | 0000041897<br>Contract I<br>0000000<br>0000000<br>0000000 | National Medical Service             | 20 21 22        | Change<br>Order<br>0<br>0<br>0 | PO Date<br>08/29/2018<br>10/03/2018<br>10/11/2018 | Buyer<br>Jordan Black-Deegan<br>Angelo Thomas Filippone<br>Angelo Thomas Filippone | Dis<br>Act<br>Y<br>Y<br>Y | PRN<br>PRN<br>PRN<br>PRN | PO Status<br>Dispatched<br>Dispatched<br>Dispatched | Hold<br>N<br>N | Rcv<br>N<br>N<br>N | Curr<br>USD<br>USD<br>USD |                                  | Amoun<br>6,090.00<br>9,130.00<br>514.00 |

## PO Listing by Buyer

| OR                 | YACLE                           | Report ID:<br>User ID:<br>Run Control: | POX4012<br>SSMITH2<br>Run_PO_Listing | <br> | <br>PeopleSoft P<br>PO LISTING I | urchasing<br>3Y BUYER |  | P.<br>Ri<br>Ri | age No.<br>un Date<br>un Time | 1<br>1/18/2019<br>10:40:58 AM |
|--------------------|---------------------------------|--|--------------------------------------|------|----------------------------------|-----------------------|--|----------------|-------------------------------|-------------------------------|
| PO Date:<br>Buyer: | s Included : 7/<br>Angelo Thoma | /1/2018 Thru:<br>Is Filippone          | 6/30/2019                            |      |                                  |                       |  |                |                               |                               |
|                    |                                 |  |                                      |      |                                  |                       |  |                |                               |                               |

## PO Listing by PO Status

| OF                 | RACLE.                         | Report ID:<br>User ID:<br>Run Control:  | POX4013<br>SSMITH2<br>Run_PO_Listing |     |                 | PO         | PeopleSoft Purchas<br>LISTING BY ST | ing<br>ATUS                   |                         | Pa<br>Ru<br>Ru | ge No.<br>in Date<br>in Time | 1<br>1/18/2019<br>10:49:12 AM |
|--------------------|--------------------------------|---|--------------------------------------|-----|-----------------|------------|-------------------------------------|-------------------------------|-------------------------|----------------|------------------------------|-------------------------------|
| PO Date<br>PO Stat | es Included :<br>us: Dispatche | 7/1/2018 Thru:<br>ed                    | 6/30/2019                            |     |                 |            |                                     |                               |                         |                |                              |                               |
| BU                 | PO ID                          | Contract ID                             |                                      | Rel | Change<br>Order | PO Date    | Supplier ID                         | Name                          | Buyer                   | Hold           | Rcv                          | Ord Qty                       |
| 02140              | 0000041146                     | 000000000000000000000000000000000000000 | 0000000033153                        | 20  | 0               | 8/29/2018  | 0000041897                          | National Medical Services Inc | Jordan Black-Deegan     | N              | N                            | 1.00                          |
| 02140              | 0000041437                     | 00000000000                             | 0000000033153                        | 21  | 0               | 10/3/2018  | 0000041897                          | National Medical Services Inc | Angelo Thomas Filippone | N              | N                            | 1.00                          |
| 02140              | 0000041514                     | 000000000000000000000000000000000000000 | 0000000033153                        | 22  | 0               | 10/11/2018 | 0000041897                          | National Medical Services Inc | Angelo Thomas Filippone | N              | N                            | 1.00                          |
| 02140              | 0000041540                     | 000000000000000000000000000000000000000 | 0000000033153                        | 23  | 0               | 10/16/2018 | 0000041897                          | National Medical Services Inc | Angelo Thomas Filippone | N              | N                            | 1.00                          |

## Requisition PO / Xref (POX4100)

**Possible situations when this report should be run:** Provides a cross-reference between requisitions and the purchase orders created from those requisitions.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Requisition/PO Xref

**Navigator Menu navigation:** Purchasing > Purchase Orders > Reports > Requisition/PO Xref

#### Click on the Add a New Value tab

| PO To Requisition Xref      |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| *Run Control ID Run_POX4100 |                          |

#### 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\_POX4100)

#### **Click the Add Button**

#### The Requisition/PO Xref page displays:

| Requisition/PO Xref        |                                    |  |  |  |  |  |
|----------------------------|------------------------------------|--|--|--|--|--|
| Run Control ID Run_POX4100 | Report Manager Process Monitor Run |  |  |  |  |  |
| Language English 🗸         |                                    |  |  |  |  |  |
| Report Request Parameters  |                                    |  |  |  |  |  |
| From Date                  | Through Date                       |  |  |  |  |  |
| Business Unit              |                                    |  |  |  |  |  |
|                            |                                    |  |  |  |  |  |
| Save Notify                | 📑 Add 🖉 Update/Display             |  |  |  |  |  |

#### Enter information on the Requisition/PO Xref page:

- From Date Enter date; or use pop-up calendar to select
- Through Date Enter Date; or use pop-up calendar to select
- Business Unit Enter the Business unit; or use the lookup to select

| Requisition/PO Xref        |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4100 | Report Manager Process Monitor Run |
| Language English 🗸         |                                    |
| Report Request Parameters  |                                    |
| From Date 07/01/2023       | Through Date 12/31/2023            |
| Business Unit 01110        |                                    |
| Save 🔚 Notify              | 📑 Add 🖉 Update/Display             |

## **Click Save button**

### **Click Run button**

#### The Process Scheduler Request page displays:

| Proce  | ss Scheduler  | r Request    |      |              |       |                |          |     |            |       |              | ×    |
|--------|---------------|--------------|------|--------------|-------|----------------|----------|-----|------------|-------|--------------|------|
|        |               |              |      |              |       |                |          |     |            |       |              | Help |
|        | User ID       | DBROCHU      |      |              |       | Run Control ID | Run_POX4 | 100 |            |       |              |      |
|        | Server Name   |              |      | ~            | Run D | ate 01/23/2024 | 31       |     |            |       |              |      |
|        | Recurrence    |              |      | ~            | Run T | ime 11:20:52AM |          | Re  | eset to Cu | rrent | Date/Time    | ]    |
|        | Time Zone     |              | Q    |              |       |                |          |     |            |       |              |      |
| Proce  | ess List      |              |      |              |       |                |          |     |            |       |              |      |
| Select | Description   |              |      | Process Name |       | Process Type   | *Туре    |     | *Format    |       | Distribution |      |
| ✓      | PO to Requisi | tion XREF Re | port | POX4100      |       | BI Publisher   | Web      | ~   | PDF        | ~     | Distribution |      |
| OK     | Canc          | el           |      |              |       |                |          |     |            |       |              | _    |

#### On the Process Scheduler Request page, select:

- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

### **Click the OK button**

## The Requisition/PO Xfer page displays:

| Requisition/PO Xref        |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POX4100 | Report Manager Process Monitor Run |
| Language English V         | Process Instance:12437283          |
| Report Request Parameters  |                                    |
| From Date 07/01/2023       | Through Date 12/31/2023            |
| Business Unit 01110        |                                    |
|                            |                                    |
| Save E Notify              | 📑 Add 🗾 Update/Display             |

#### Click the **Process Monitor** link

#### The Process List page displays:

| Proces                                 | ss List 🧕  | erver List |                |              |                 |         |                           |  |            |                        |         |              |
|--|--|------------|----------------|--------------|-----------------|---------|---------------------------|--|------------|------------------------|---------|--------------|
| View Prod<br>User I<br>Servi<br>Run Si | Iew Process Requests         User ID       DBROCHU       Type <ul> <li>Last</li> <li>20</li> <li>Minutes</li> <li>Refresh</li> </ul> Server <ul> <li>Name</li> <li>Instance</li> <li>Range</li> <li>Clear</li> </ul> Run Status <ul> <li>Distribution Status</li> <li> </li></ul> <li>Instance</li> <li>Report Manager</li> <li>Reset</li> |            |                |              |                 |         |                           |  |            |                        |         |              |
| ✓ Proces                               | ss List  |            |                |              |                 |         |                           |  |            | < < 1-1 of 1           | · • >   | >   View All |
| Select                                 | Instance   | Seq.       | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time             |  | Run Status | Distribution<br>Status | Details | Actions      |
|  | 12437283   |            | Run_POX4100    | BI Publisher | POX4100         | DBROCHU | 01/23/2024 11:20:52AM EST |  | Success    | Posted                 | Details | ✓Actions     |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

#### Report Manager List Explorer Administration Archives **View Reports For** User ID DBROCHU 5 Days ✓ Last ~ Туре $\sim$ Refresh Status ~ Folder $\sim$ Instance to Report List 1-39 of 39 🗸 Q View All 野 Prcs Request Report Select Details Description Format Status ID Instance Date/Time 01/23/2024 Acrobat 5514171 12437283 POX4100 - POX4100.pdf Posted Details 11:22:07AM (\*.pdf)

## Click on *Report Manager* link, then Click on the Administration tab

Click on <u>POX4100 – POX4100.pdf</u> link

## Example of Report Output

| ORACLE.                              | Report ID<br>User ID:<br>Run Cont | l:<br>trol: | POX4100<br>DSHEPARD<br>Run_PO_Re | quisitio | n_Xfer |      | Ρ           | PeopleS<br>O TO REQUISI | oft Purchasin<br>TION XREI | REP | ORT |       |    |     |      | Page<br>Run I<br>Run 1 | No. 1<br>Date 1/10/20<br>Time 12:43:1 | 19<br>8 PM |
|--------------------------------------|-----------------------------------|-------------|----------------------------------|----------|--------|------|-------------|-------------------------|----------------------------|-----|-----|-------|----|-----|------|------------------------|---------------------------------------|------------|
| PO Dates Included:<br>Business Unit: | 07/01/2018<br>01110               | Thru        | : 12/31/2018                     |          |        |      |             |                         |                            |     |     |       |    |     | Pear | in Man                 |                                       |            |
|                                      |                                   | 0045480     | 0                                |          | Seb    | Dst  | Item ID     | Description             | Order Qtv                  | UOM | Cur | Price | ID | Lin | Sch  | Dst                    | Quantity                              | UON        |
| Contract ID                          |                                   | Rel         | supplier iD                      | Lin      | ach    | 0.54 | 0.000000000 |                         |                            |     |     |       |    |     |      |                        |                                       |            |

## Dispatch POs (POXMLP)

**Possible situations when this report should be run:** This report provides the ability to dispatch purchase orders individually or in volume. A purchase order must have a status of Approved and have passed the commitment control budget check to be eligible for dispatch.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Purchase Orders > Dispatch POs

**Navigator Menu navigation:** Purchasing > Purchase Orders > Dispatch POs

#### Click on the Add a New Value tab

| Dispatch Purchase Orders     |                          |
|------------------------------|--------------------------|
| Add a New Value              | Q Find an Existing Value |
| *Run Control ID Dispatch_POs |                          |

#### **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\_POXMLP)

#### **Click the Add Button**

#### The Dispatch POs page displays:

| Dispatch POs               |   |  |                     |                           |
|----------------------------|---|--|---------------------|---------------------------|
| Run Control ID<br>Language | Dispatch_POs     Report     Finglish     Specified Language | Manager Process Monitor Recipient's La | Run<br>nguage       |                           |
| Process Request Parameters |   | Statuses to Include                    |                     |                           |
| Business Unit              | <b>Q</b>  | Approved                               | Dispatched          | Pending Cancel            |
| То                         | Q   | Dispatch Methods to Include            | е                   |                           |
| POID                       | Q Select Purchase Order                                     | ✓ Print                                | ✓ FAX               | ✓ EDX                     |
| Contract SetID             | Q   | E-Mail                                 | Phone               |                           |
| Contract ID                | ٩   | Miscellaneous Options                  |                     |                           |
| Release                    | Q   | *Chartfields                           | Valid Chartfields   | ~                         |
| From Date                  | 9   | Change Orders                          | Changed and UnChan  | ged Orders 🗸 🗸            |
| Through Date               | BI  | Print Changes Only                     |                     | Print BU Comments         |
| Supplier ID                | Q   | Test Dispatch                          |                     | Print PO Item Description |
| Buyer                      | Q   | Print Copy                             |                     | Print Duplicate           |
| Fax Cover Page             | Q   | Sort By                                | Sort by Line Number | ~                         |
| Template ID                | ٩   |  |                     |                           |
|                            |   |  |                     |                           |
| Save E Notify              |   |  |                     | 📑 Add 🖉 Update/Display    |

#### Enter information on the Dispatch POs page:

#### **Process Request Parameters:**

- Business Unit Enter the Business unit; or use the lookup to select; or leave blank
- **To** Enter the "To" Business unit; or use the lookup to select; or leave blank
- **PO ID** Enter the PO ID; or use the lookup to select (entry will gray out Contract SetID, Contract ID, Release, From Date, Through Date, Supplier ID and Buyer and all the Statuses to Include fields).
- Contract SetID Enter the Contract SetID; or use the lookup to select; or leave blank
- **Contract ID** Enter the Contract ID; or use the lookup to select; or leave blank
- Release Enter the Release; or use the lookup to select; or leave blank
- From Date Enter desired From Date To; or use pop-up calendar to select
- Through Date Enter desired Through Date To; or use pop-up calendar to select
- **Supplier ID** Enter the Supplier ID; or use the lookup to select; or leave blank
- Buyer Use the lookup to select; or leave blank
- Fax Cover Page Use the lookup to selec;t or leave blank
- Template ID Use the lookup to select; or leave blank

Statuses to Include – Select the desired Statuses; or leave blank

#### Dispatch Methods to Include - Select the desired Dispatch Methods to Include

#### **Miscellaneous Options:**

- Chartfields Choose from the drop-down the type of chartfields
- **Change Orders** Choose from the drop down the type of Change Orders
- Print Changes Only Check if you want to include; or leave blank
- **Test Dispatch** Check if you want to include; or leave blank
- **Print Copy** Check if you want to include; or leave blank
- **Print BU Comments** Check if you want to include; or leave blank
- Print PO Item description Default option checked
- **Print Duplicate** Check if you want to include or leave blank
- Sort by Choose from the drop down how the report is to be sorted, default value is Sort by Line Number

| Dispatch POs                                      |                                     |                          |                      |                           |
|---|-------------------------------------|--------------------------|----------------------|---------------------------|
| Run Control ID Dispatch_POs<br>Language English v | Report Manage<br>Specified Language | r Process Monitor Ri     | un<br>guage          |                           |
| Process Request Parameters                        | Sta                                 | tuses to Include         |                      |                           |
| Business Unit 02140                               |                                     | Approved                 | Dispatched           | Pending Cancel            |
| То  | Dis                                 | patch Methods to Include |                      |                           |
| PO ID 0000051108 Q Select                         | t Purchase Order                    | Print                    | FAX                  | ✓ EDX                     |
| PO Status Dispatched                              | V                                   | E-Mall                   | Phone                |                           |
| Contract SetID                                    | Mis                                 | cellaneous Options       |                      |                           |
| Contract ID                                       |                                     | *Chartfields             | Valid Chartfields    | ~                         |
| Release   |                                     | Change Orders            | Changed and UnChange | d Orders 🗸                |
| From Date   |                                     | Print Changes Only       |                      | Print BU Comments         |
| Through Date                                      |                                     | Test Dispatch            |                      | Print PO Item Description |
| Supplier ID                                       |                                     | Print Copy               |                      | Print Duplicate           |
| Buyer   |                                     | Sort By                  | Sort by Line Number  | ~                         |
| Fax Cover Page                                    |                                     |                          |                      |                           |
| Template ID PO_DISPATCH_1                         | Q                                   |                          |                      |                           |
|   |                                     |                          |                      |                           |
| Save E Notify                                     |                                     |                          |                      | 🛃 Add 🕖 Update/Display    |

### **Click Save button**

## **Click Run button**

## The Process Scheduler Request page displays:

| Process Scheduler Request |                                |                                | ×    |
|---------------------------|--------------------------------|--------------------------------|------|
|                           |                                |                                | Help |
| User ID DBROCHU           | Run Control ID Di              | ispatch_POs                    |      |
| Server Name               | ✓ Run Date 01/23/2024          |                                |      |
| Recurrence                | ✓ Run Time 11:44:50AM          | Reset to Current Date/Time     |      |
| Time Zone                 |                                |                                |      |
| Process List              |                                |                                |      |
| Select Description        | Process Name Process Type      | *Type *Format Distribution     |      |
| PO BI Publisher Dispatch  | POXMLP PSJob                   | (None) V (None) V Distribution |      |
| Email                     | PO_PO_EMAIL Application Engine | Web V TXT V Distribution       |      |
| OK Cancel                 |                                |                                |      |

## On the Process Scheduler Request page, select:

- Type Choose desired value (None) is recommended
- Format Choose desired value (None) is recommended

#### Click the OK button

## The Dispatch POs page displays with your Process Instance

| Dispatch POs |                            |                           |                                   |  |
|--------------|----------------------------|---------------------------|-----------------------------------|--|
|              | Run Control ID<br>Language | Dispatch_POs<br>English v | Report Manager Specified Language | Process Monitor Run O Recipient's Language |
|              |                            |                           |                                   | Process Instance:12437284                  |

#### Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proces                            | ss List  | Server List |                |              |                 |         |                           |            |                        |         |              |
|-----------------------------------|--|-------------|----------------|--------------|-----------------|---------|---------------------------|------------|------------------------|---------|--------------|
| View Pro<br>User<br>Serv<br>Run S | View Process Requests         User ID       DBROCHU       Q       Type |             |                |              |                 |         |                           |            |                        |         |              |
| ✓ Proces                          | ss List  |             |                |              |                 |         |                           |            |                        |         |              |
| ER C                              | 2  |             |                |              |                 |         |                           |            | < <u>1-1 of </u>       |         | >   View All |
| Select                            | Instance   | Seq.        | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time             | Run Status | Distribution<br>Status | Details | Actions      |
|                                   | 12437284   |             | Dispatch_POs   | PSJob        | POXMLP          | DBROCHU | 01/23/2024 11:44:50AM EST | Success    | Posted                 | Details | ✓Actions     |

## Click on *Report Manager* link, then Click on the Administration tab

| Report Manager |              |                  |                               |                          |                    |          |          |         |  |  |  |
|----------------|--------------|------------------|-------------------------------|--------------------------|--------------------|----------|----------|---------|--|--|--|
| List           | Explorer     | Administrat      | on Archives                   |                          |                    |          |          |         |  |  |  |
| View Repor     | ts For       |                  |                               |                          |                    |          |          |         |  |  |  |
| User ID        | DBROCHU      | Туре             | ✓ Last                        | ~                        | 15 M               | inutes v | ]        | Refresh |  |  |  |
| Status         |              | Y Folder         | ✓ Instance                    | to                       |                    |          |          |         |  |  |  |
|                |              |                  |                               |                          |                    |          |          |         |  |  |  |
| Report List    |              |                  |                               |                          |                    |          |          |         |  |  |  |
| E, Q           |              |                  |                               | K < [                    | 1-1 of 1 🗸         | > >      | View All |         |  |  |  |
| Select         | Report<br>ID | Prcs<br>Instance | Description                   | Request<br>Date/Time     | Format             | Status   | Details  |         |  |  |  |
|                | 5514173      | 12437285         | PO_DISPATCH - PO_DISPATCH.pdf | 01/23/2024<br>11:47:38AM | Acrobat<br>(*.pdf) | Posted   | Details  |         |  |  |  |

Click on <u>PO\_DISPATCH – PO\_DISPATCH.pdf</u> link

## Example of Report Output

|  | PURCHASE<br>MEMORANE<br>Purchase Or   | ORDER N<br>A, BILLS | IO. MUST APPEA<br>OF LADING, PAC<br>Date                           | R ON ALL INVOICES,<br>KAGES AND CORRE<br>Revision | DELIVERY<br>SPONDENCE.<br>Page |
|--|---------------------------------------|---------------------|--|---|--------------------------------|
|  | 02140-0000051108 0<br>Payment Terms F |                     | 09-06-2022<br>Freight Terms  | PO Status   | 1<br>Currency                  |
| State of Vermont   |                                       |                     | Destination  | Dispatched  | USD                            |
| 45 State Drive   | Katie R Irish                         |                     | Phone  |   |                                |
| Supplier: 0000399995<br>McGee Ford of Montpelier<br>265 River Street<br>Montpelier VT 05602<br>United States |                                       | Ship To:            | DPS - Fleet Se<br>394 Hegeman<br>Colchester VT<br>United States    | rvices<br>Ave<br>05446                            |                                |
| United States  |                                       | Bill To:            | Department of<br>45 State Drive<br>Waterbury VT (<br>United States | Public Safety<br>05671                            |                                |
| Line-Sch Description   | Quantity                              | UOM                 | Unit Pric  | ce Extended Am                                    | t Due Date                     |
| <pre>1 - 1 Off the Lot/Multi-Year<br/>Vehicles Other than Current<br/>Model Year:</pre>                      | 1.00                                  | EA                  | 42,670.2   | 42,670.24   | 5 01/04/2023                   |
| Contract ID: 00000000000000000042688   |                                       | Contra              | ct Line: 49  |   |                                |
|  |                                       |                     | Item Total   | 42,670.20   | 5                              |
|  |                                       |                     | Total PO   | 42,670,26   |                                |

## Schedule Listings – By PO Date/ by Supplier/ or by Buyer

**Possible situations when this report should be run:** This report provides purchase order schedule information such as ship to and due date sorted by purchase order date.

Three reports can be produced from the same run control page: Schedule Listings by PO Date (POX4040), Schedule Listings by Supplier (POX4041), and Schedule Listings by Buyer (POX4042).

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Schedule Listings

#### Click on the Add a New Value tab

| O Schedule Listings              |                          |  |  |  |  |  |  |  |  |
|----------------------------------|--------------------------|--|--|--|--|--|--|--|--|
| Add a New Value                  | Q Find an Existing Value |  |  |  |  |  |  |  |  |
| *Run Control ID Run_Schedule_Lis |                          |  |  |  |  |  |  |  |  |

#### **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\_POX404X)

#### **Click the Add Button**

#### The Schedule Listings page displays:

| Schedule Listings     |                                    |                |                      |
|-----------------------|------------------------------------|----------------|----------------------|
| Rur                   | n Control ID Run_Schedule_Listings | Report Manager | Process Monitor Run  |
|                       | Language English 🗸                 |                |                      |
| Report Request Parame | ters                               |                |                      |
| From Date             | BI                                 | Through Date   |                      |
| Business Unit         | Q                                  |                |                      |
| Supplier SetID        | Q                                  |                |                      |
| Supplier ID           | Q                                  |                |                      |
| Buyer                 | Q                                  |                |                      |
| 🗐 Save 🔛 Notify       |                                    |                | Add 🗾 Update/Display |

#### Enter information on the Schedule Listings page:

- From Date Enter desired From Date To; or use pop-up calendar to select
- Through Date Enter desired Through Date To; or use pop-up calendar to select
- Business Unit Enter the Business unit; or use the lookup to select; or leave blank
- **Supplier SetID** Default is STATE
- **Supplier ID** Enter the Supplier ID; or use the lookup to select; or leave blank
- Buyer Use the lookup to select; or leave blank

| Schedule Listings     |                                      |            |                         |                  |                |
|-----------------------|--------------------------------------|------------|-------------------------|------------------|----------------|
| Ru                    | Run Control ID Run_Schedule_Listings |            |                         | nager Process Mo | onitor Run     |
|                       | Language                             | iglish 🗸   |                         |                  |                |
| Report Request Parame | eters                                |            |                         |                  |                |
| From Date             | 07/01/2022                           | 31         | Through Date 12/31/2023 | 31               |                |
| Business Unit         | 02140                                | ٩          |                         |                  |                |
| Supplier SetID        | STATE                                |            |                         |                  |                |
| Supplier ID           | 0000041897                           | ] <b>Q</b> |                         |                  |                |
| Buyer                 |                                      | Q          |                         |                  |                |
|                       |                                      |            |                         |                  |                |
| Save E Notify         |                                      |            |                         | 📑 Add 🗾          | Update/Display |

#### **Click Save button**

#### **Click Run button**

#### The Process Scheduler Request page displays:

| Proces | ss Schedule  | er Request        |              |          |               |              |               |                | X    |
|--------|--------------|-------------------|--------------|----------|---------------|--------------|---------------|----------------|------|
|        | User ID      | ETEST             |              |          | Run Control I | D Run_PO_Sch | nedule_Listin | igs            | neit |
| 4      | Server Name  |                   | $\checkmark$ | Run Date | 01/17/2019    | 31           |               |                |      |
|        | Recurrence   |                   | $\checkmark$ | Run Time | 9:17:05AM     | Rese         | et to Current | Date/Time      |      |
|        | Time Zone    | Q                 |              |          |               |              |               |                |      |
| Proce  | ss List      |                   |              |          |               |              |               |                |      |
| Select | Description  |                   | Process Na   | me P     | rocess Type   | *Type        | *Format       | Distribution   |      |
|        | Schedule Lis | sting by PO Date  | POX4040      | B        | I Publisher   | Web          | PDF           | ✔ Distribution |      |
|        | Schedule Lis | sting by Supplier | POX4041      | B        | I Publisher   | Web          | PDF           | ✓ Distribution |      |
|        | Schedule Lis | sting by Buyer    | POX4042      | В        | I Publisher   | Web          | PDF           | ✔ Distribution |      |

#### On the Process Scheduler Request page, select:

- Select Click the box for Schedule Listing (select whatever reports you need)
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

The Schedule Listings page displays your Process Instance(s) depending on what reports you chose to run.

| Schedule Listings                    |                                     |
|--------------------------------------|-------------------------------------|
| Run Control ID Run_Schedule_Listings | Report Manager Process Monitor Run  |
| Language English V                   | Process                             |
| -                                    | Instance:12437286,12437287,12437288 |

### Click the <u>Process Monitor</u> link

#### The Process List page displays:

| Proce    | ss List   | Server List |                       |              |                 |         |                           |            |                        |         |          |  |
|----------|---|-------------|-----------------------|--------------|-----------------|---------|---------------------------|------------|------------------------|---------|----------|--|
| View Pro | View Process Requests<br>User ID DBROCHU Q Type Last v 20 Minutes v Refresh |             |                       |              |                 |         |                           |            |                        |         |          |  |
| Serv     | /er   | ~           | Name                  | Q Instance   |                 | Range   | Clear                     |            |                        |         |          |  |
| Run S    | Status  | ~           | Distribution Status   | ~            | Save On Re      | efresh  | Report Manager Reset      |            |                        |         |          |  |
| N Proce  | oo Liot   |             |                       |              |                 |         |                           |            |                        |         |          |  |
|          | λ   |             |                       |              |                 |         |                           |            | < 1-3 of 3             | • > >   | View All |  |
| Select   | Instance  | Seq.        | Run Control ID        | Process Type | Process<br>Name | User    | Run Date/Time             | Run Status | Distribution<br>Status | Details | Actions  |  |
|          | 12437288  |             | Run_Schedule_Listings | BI Publisher | POX4042         | DBROCHU | 01/23/2024 12:52:51PM EST | Success    | Posted                 | Details | ✓Actions |  |
|          | 12437287  |             | Run_Schedule_Listings | BI Publisher | POX4041         | DBROCHU | 01/23/2024 12:52:51PM EST | Success    | Posted                 | Details | ✓Actions |  |
|          | 12437286  |             | Run_Schedule_Listings | BI Publisher | POX4040         | DBROCHU | 01/23/2024 12:52:51PM EST | Success    | Posted                 | Details | ✓Actions |  |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

## Click on *Report Manager* link, then Click on the Administration tab

| Report Manager |              |                  |                       |                          |                    |               |          |         |  |  |
|----------------|--------------|------------------|-----------------------|--------------------------|--------------------|---------------|----------|---------|--|--|
| List           | Explorer     | Administration   | Archives              |                          |                    |               |          |         |  |  |
| View Repo      | rts For      |                  |                       |                          |                    |               |          |         |  |  |
| User ID        | DBROCHU      | Туре             | ✓ La:                 | st v                     | 5                  | Minutes ~     |          | Refresh |  |  |
| Status         |              | ~ Folder         | ∽ Instance            | to                       |                    |               |          |         |  |  |
|                |              |                  | _                     |                          |                    |               |          |         |  |  |
| Report List    |              |                  |                       |                          |                    |               |          |         |  |  |
| E, Q           |              |                  |                       | K <                      | 1-3 of 3 v         | $\rightarrow$ | View All |         |  |  |
| Select         | Report<br>ID | Prcs<br>Instance | Description           | Request<br>Date/Time     | Format             | Status        | Details  |         |  |  |
|                | 5514179      | 12437286         | POX4040 - POX4040.pdf | 01/23/2024<br>12:54:41PM | Acrobat<br>(*.pdf) | Posted        | Details  |         |  |  |
|                | 5514178      | 12437287         | POX4041 - POX4041.pdf | 01/23/2024<br>12:54:41PM | Acrobat<br>(*.pdf) | Posted        | Details  |         |  |  |
|                | 5514177      | 12437288         | POX4042 - POX4042.pdf | 01/23/2024<br>12:54:34PM | Acrobat<br>(*.pdf) | Posted        | Details  |         |  |  |

## Click on <u>POX404X – POX404X.pdf</u> link

## Example of Report Output(s):

### PO Schedule Listing by PO Date

| ORACLE                               | Report ID:<br>User ID:<br>Run Control:                                | POX4040<br>DBROCHU<br>Run_Schedule_Listings | PeopleSoft Purchasing<br>PO SCHEDULE LISTING BY PO DATE |     |                                |           |     | Page No.<br>Run Date<br>Run Time |        |        | 1<br>1/23/2024<br>9:54:41 AM |
|--------------------------------------|---|---|---|-----|--------------------------------|-----------|-----|----------------------------------|--------|--------|------------------------------|
| PO Dates Included:<br>Business Unit: | PO Dates incluided: 7/1/2022 Thru: 12/31/2023<br>Business Unit: 02140 |   |   |     |                                |           |     |                                  |        |        |                              |
| Contract ID                          |   | Rel Supplier ID Line                        | Item ID Item Description                                | Sch | Shipto ID Due Dat              | Order Qty | UOM | CUR                              | Amount | Rev Fr | eight Ship Via               |
| PO ID: 000                           | 00053389<br>039535  | PO Date: 7/21/2023<br>78 0000041897 1       | blood toxicology testing                                | 1   | PDPSWT 7/21/20<br>8001 7/21/20 | 23 1.00   | EA  | USD                              | 358.00 | FC     | BDE BESTWAY                  |

### PO Schedule Listing by Supplier

| ORACLE  | Report ID:<br>User ID:<br>Run Control: | POX4041<br>DBROCHU<br>Run_Sched<br>ule_Listing<br>s | PeopleSoft Purchasing Page No<br>PO SCHEDULE LISTING BY SUPPLIER Run Date<br>Run Time                | 1<br>1/23/2024<br>9:54:40 AM |
|---|--|---|--|------------------------------|
| PO Dates Included:<br>Supplier SetId:<br>Supplier ID:     | 7/1/2022<br>STATE<br>0000041897        | Thru: 12/31/2023                                    |  |                              |
| Contract ID   |  | RelLineItem ID                                      | Item DescriptionSchdShipto IDDue DateOrder QtyUOMCURAmountRevFreig                                   | ht Ship Via                  |
| Business Unit: 021<br>00000000000000000000000000000000000 | <b>40</b><br>39535                     | PO ID: 0000053389<br>78 1                           | PO Date: 7/21/2023<br>blood toxicology 1 PDPSW 7/21/2023 1.00 EA USD 358.00 FOBI<br>testing TB001 ST | DE BESTWAY                   |

## PO Schedule Listing by Buyer

| ORACLE   | Report ID: POX4042<br>User ID: DBROCHU<br>Run Control: Run_Schedule_Listings |        |                 |                | PeopleSoft Purchasing<br>PO SCHEDULE LISTING BY BUYER |           |                          |     |                |           | Page<br>Run<br>Run | : No.<br>Date<br>Time | 1<br>1/23/2024<br>9:54:34 AM |        |     |         |          |
|--|--|--------|-----------------|----------------|---|-----------|--------------------------|-----|----------------|-----------|--------------------|-----------------------|------------------------------|--------|-----|---------|----------|
| PO Dates Included:<br>Buyer: Eric Ker                      | 7/1/2022<br>nneth Brooks   | 2      | Thru:           | 2/31/2023      |   |           |                          |     |                |           |                    |                       |                              |        |     |         |          |
| Contract ID  |  |        | Rel Supplier ID | Line           | Item ID   |           | Item Description         | Sch | Shipto ID      | Due Date  | Order Qty          | UOM                   | CUR                          | Amount | Rev | Freight | Ship Via |
| Business Unit: 0214<br>00000000000000000000000000000000000 | <b>10</b><br>039535  | PO ID: | 00000533<br>78  | 9 PO Date<br>1 | e: 7  | //21/2023 | blood toxicology testing | 1   | PDPSWT<br>B001 | 7/21/2023 | 1.00               | EA                    | USD                          | 358.00 |     | FOBDEST | BESTWAY  |

## Activity (POPO009)

**Possible situations when this report should be run:** This report lists purchase order activity for the purchasing business unit, GL business unit, department, and dates that you select. Reviewing this report enables you to perform comparisons and resolve discrepancies proactively.

Navigator Menu navigation: Purchasing > Purchase Orders > Reports > Activity

#### Click on the Add a New Value tab

| PO Activity                     |                          |
|---------------------------------|--------------------------|
| Add a New Value                 | Q Find an Existing Value |
| *Run Control ID Run_POPO009 Add |                          |

#### **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\_POPO009)

#### **Click the Add Button**

#### The Activity page displays:

| Activity                  |                     |                                    |
|---------------------------|---------------------|------------------------------------|
| Run Control ID Ru         | In_POPO009          | Report Manager Process Monitor Run |
| Language En               | iglish 🗸            |                                    |
| Report Request Parameters |                     |                                    |
| Business Unit             |                     |                                    |
| GL Business Unit          | Include Cancelled F | POs?                               |
| Department                | C Include Open/Pend | ing Appr POs?                      |
| From Date                 |                     |                                    |
| Option Q                  | Nbr Days Date       | 3                                  |
| Through Date              |                     |                                    |
| Option Q                  | Nbr Days Date       | 31                                 |
|                           |                     |                                    |
| 🔚 Save 🔚 Notify 📿 Refresh |                     | 📑 Add 🗾 Update/Display             |

#### Enter information on the Activity page:

#### **Report Request Parameters:**

- Business Unit Enter the Business unit; or use the lookup to select; or leave blank
- **GL Business Unit** Enter the GL Business unit; or use the lookup to select; or leave blank
- Include Cancelled POs? Click the box to Include Cancelled POs; or leaveblank
- **Department** Enter the Department; or use the lookup to select; or leaveblank
- Include Open/Pending/Appr POs? Click the box to Include Open/Pending/Approved POs; or leave blank

#### From Date Selection:

- **Option** Enter the Option code; or use the magnifying glass to lookup; or leave blank
- Nbr Days Enter the desired number of days; or leave blank
- Date Enter the desired date; or click on calendar icon to select the date

#### Through Date Selection:

- **Option** Enter the Option code; or use the magnifying glass to lookup; or leave blank
- **Nbr Days** Enter the desired number of days; or leave blank
- Date Enter the desired date; or click on calendar icon to select the date

| Activity                  |                                      |                             |
|---------------------------|--------------------------------------|-----------------------------|
| Run Control ID Ru         | un_POPO009 Report M                  | lanager Process Monitor Run |
| Language                  | nglish 🗸                             |                             |
| Report Request Parameters |                                      |                             |
| Business Unit 02140 Q     |                                      |                             |
| GL Business Unit 02140 Q  | ✓ Include Cancelled POs?             |                             |
| Department                | Q     Include Open/Pending App     ■ | r POs?                      |
| From Date                 |                                      |                             |
| Option N Q                | Nbr Days Date                        | B                           |
| Through Date              |                                      |                             |
| Option N Q                | Nbr Days Date                        | <b>B</b>                    |
|                           |                                      |                             |
| 🔚 Save 🖹 Notify 📿 Refresh |                                      | 📑 Add 🛛 🖉 Update/Display    |

#### **Click Save button**

**Click Run button** 

#### The Process Scheduler Request page displays:

| Proces       | ss Scheduler | Request |   |              |         |               |        |         |            |         |              | ×    |
|--------------|--------------|---------|---|--------------|---------|---------------|--------|---------|------------|---------|--------------|------|
|              |              |         |   |              |         |               |        |         |            |         |              | Help |
|              | User ID      | DBROCHU |   |              |         | Run Control I | D Run_ | POPO009 | 9          |         |              |      |
|              | Server Name  |         |   | ~            | Run Da  | te 01/23/2024 |        | 31      |            |         |              |      |
|              | Recurrence   |         |   | ~            | Run Tim | ie 1:29:21PM  |        | R       | eset to Cu | rrent C | Date/Time    |      |
|              | Time Zone    |         | Q |              |         |               |        |         |            |         |              |      |
| Proce        | ss List      |         |   |              |         |               |        |         |            |         |              |      |
| Select       | Description  |         |   | Process Name | e P     | rocess Type   | *Ту    | ре      | *Format    | 1       | Distribution |      |
| $\checkmark$ | PO Activity  |         |   | POPO009      | S       | QR Report     | W      | eb 🗸    | PDF        | ~       | Distribution |      |
|              |              |         |   |              |         |               |        |         |            |         |              |      |
|              |              |         |   |              |         |               |        |         |            |         |              |      |
|              |              |         |   |              |         |               |        |         |            |         |              |      |
| OK           | Cance        | Refres  | h |              |         |               |        |         |            |         |              |      |

## On the Process Scheduler Request page, select:

- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

#### The Activity page displays, and your Process Instance is available

| Activity                   |                                    |
|----------------------------|------------------------------------|
| Run Control ID Run_POP0009 | Report Manager Process Monitor Run |
| Language English 🗸         | Process Instance:12437302          |

#### Click the *Process Monitor* link. The Process List page displays:

| Proces    | ss List   | Gerver List |                   |              |                 |           |                          |            |                        |            |              |
|-----------|---|-------------|-------------------|--------------|-----------------|-----------|--------------------------|------------|------------------------|------------|--------------|
| View Prod | ew Process Requests<br>User ID DBROCHU Q Type V Last V 20 Minutes Refresh<br>Server V Name Q Instance Range Clear |             |                   |              |                 |           |                          |            |                        |            |              |
| Serv      | er  | <u> </u>    | Name              | Q Insta      | nce             | Range     | Clear                    |            |                        |            |              |
| Run St    | tatus   | ~           | Distribution Stat | us           | ✓ Save O        | n Refresh | Report Manager Reset     |            |                        |            |              |
| ✓ Proces  | s List  |             |                   |              |                 |           |                          |            |                        |            |              |
| E, Q      | L .   |             |                   |              |                 |           |                          |            | < < 1-1 of 1           | <b>~</b> > | >   View All |
| Select    | Instance  | Seq.        | Run Control ID    | Process Type | Process<br>Name | User      | Run Date/Time            | Run Status | Distribution<br>Status | Details    | Actions      |
|           | 12437302  |             | Run_POPO009       | SQR Report   | POPO009         | DBROCHU   | 01/23/2024 1:29:21PM EST | Processing | N/A                    | Details    | ✓Actions     |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

| Report N    | lanager                       |                  |             |                         |                    |         |          |         |
|-------------|-------------------------------|------------------|-------------|-------------------------|--------------------|---------|----------|---------|
| List        | Explorer                      | Administration   | Archives    |                         |                    |         |          |         |
| View Repo   | orts For                      |                  |             |                         |                    |         |          |         |
| User ID     | DBROCHU                       | Туре             | ✓ La        | st v                    | 20                 | Minutes | · .      | Refresh |
| Status      | Status V Folder V Instance to |                  |             |                         |                    |         |          |         |
|             |                               |                  |             |                         |                    |         |          |         |
| Report List |                               |                  |             |                         |                    |         |          | _       |
|             | ]                             |                  |             | <                       | (1-1 of 1          | ✓ > >   | View All |         |
| Select      | Report<br>ID                  | Prcs<br>Instance | Description | Request<br>Date/Time    | Format             | Status  | Details  |         |
|             | 5514192                       | 12437302         | PO Activity | 01/23/2024<br>1:30:03PM | Acrobat<br>(*.pdf) | Posted  | Details  |         |

## Click on *Report Manager* link, then Click on the Administration tab

Click on <u>PO Activity</u> link

## Example of Report Output

| Report ID: POP                | 20009   |                     | Pe<br>PURCHA                               | opleSoft Financi<br>SE ORDER ACTIVIT | als<br>Y REPORT   | <b>T</b>    | Page<br>Run 1<br>Run 1 | 1 of 10761<br>Date 01/23/2024<br>Fime 13:30:20 |
|-------------------------------|---|---------------------|--|--------------------------------------|---|-------------|------------------------|--|
| GL Business Uni<br>Department | it : 02140Public Safety<br>                       |                     |  |                                      | FO Create Dates Included :<br>Include Cancelled POs :<br>Include Open/Pending Approva         | 1 POs :     | Y<br>Y                 |  |
| Create Dt/<br>Status          | Supplier/<br>me DtBuyer                           | PO ID/<br>Line/Schd | Category/<br>Descr                         | Mfg Item Id/<br>Manufacturer         | Item Id/<br>Descr Orde  | r Qty Price | <u>UOM</u> _E:         | stended Price Curr                             |
| 03/22/2007 04/<br>Complete    | /21/2007 Applied Biosystems<br>VFERRIS            | 0000010450<br>1/1   | 17599<br>LAB. EQUIP, PARTS<br>SUPPLIES     | á                                    | BUFFER/FORMAMIDE/   | 1.00        | 0.00 EA                | 0.00 USD                                       |
| 03/22/2007 04/3<br>Complete   | 21/2007 Applied Biosystems<br>VFERRIS             | 0000010452<br>1/1   | 17599<br>LAB. EQUIP, PARTS                 | ć                                    | 000000000000000643<br>LABORATORY SUPPLIES,<br>CHEMICALS &<br>REAGENTIN ACCORDANCE<br>WITH THE | 1.00        | 0.00 EA                | 0.00 USD                                       |
| 02/12/2015 03/                | /14/2015 Elsag North America                      | 0000031839          | 05506                                      |                                      |   | 1.00        | 0.00 EA                | 0.00 USD                                       |
| Complete                      | AGEE  | 1/1                 |  |                                      | DPS LICENSE PLATE<br>READER EQUIPMENT   |             |                        |  |
| 11/17/2016 12/                | /17/2016 Fisher Scientific<br>Company LLC<br>LCFF | 0000036821          | AUTOMOTIVE PARTS                           |                                      | upgRADE   | 1.00        | 0.00 EA                | 0.00 USD                                       |
|                               |   | -/ -                | LAB. EQUIP, PARTS<br>SUPPLIES              | 6                                    | x1; headspace vials<br>and closures 10pk x1   |             |                        |  |
| 10/07/2021 11/<br>Complete    | 06/2021 Grainger<br>KHOUGH                        | 0000048907<br>1/1   | 32099<br>FASTENERS NOT<br>OTHERWISE CLASSI |                                      | Fasteners / 35%<br>DISCOUNT   | 1.00        | 0.00 EA                | 0.00 USD                                       |
| 06/10/2010 07/<br>Complete    | /10/2010 Ray Beane<br>Incorporated<br>MBEAN2      | 0000021189<br>1/1   | 86325                                      |                                      | PASSENGER CAR TIRES   | 2.00        | 0.00 EA                | 0.00 USD                                       |
|                               |   |                     | TIRES, ALL TYPES                           |                                      | PRICING BASED ON<br>CURRENT PRICE LIST  |             |                        |  |
| 07/13/2010 08/                | /12/2010 Ray Beane<br>Incorporated<br>MBEAN2      | 0000021293<br>1/1   | 86325                                      |                                      | PASSENGER CAR TIRES   | 1.00        | 0.00 EA                | 0.00 USD                                       |
| 04/17/2018 05/                | (17/2010 Bar Bara                                 |                     | TIRES, ALL TYPES                           |                                      | PRICING BASED ON<br>CURRENT PRICE LIST  |             |                        |  |
| Complete                      | Incorporated<br>MBEAN2                            | 0000040254<br>1/1   | 86325<br>TIRES, ALL TYPES                  |                                      | PURSUIT AND<br>PERFORMANCE TIRES  | 1.00        | 0.00 EA                | 0.00 USD                                       |
| 1                             |   |                     |  |                                      |   |             |                        |  |

## **Requisition Reports**

## VT Req Budgetary Activity Report (VTPO8002)

**Possible situations when this report should be run:** This report lists all active Req's with related info and amounts budgeted, liquidated, purchased and remaining.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Requisition Report > VT Req Budgetary Activity Report

Navigator Menu navigation: Purchasing > Requisitions > Reports > VT Req Budgetary Activity

#### Click on the Add a New Value tab

| VT Req Budgetary Activity    |                          |
|------------------------------|--------------------------|
| Add a New Value              | Q Find an Existing Value |
| *Run Control ID Run_VTPO8002 |                          |

#### **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)

#### Click the Add Button and The Vt Run Pos8002 page displays:

| Vt Run Pos8002             |                           |                       |                        |                        |                       |
|----------------------------|---------------------------|-----------------------|------------------------|------------------------|-----------------------|
| Run Control ID<br>Language | Run_VTPO8002<br>English v | Report                | Manager Process Mo     | nitor Run              |                       |
| Report Request Parameter   | ers                       |                       |                        |                        |                       |
| Business Unit GL:          | Q *Budget Date From:      | 31 *To:               | 31                     |                        |                       |
| Remaining Amount:          | <b>v</b>                  | 0.000                 | This report will re    | turn data meeting eith | ner                   |
| REQ Status:                | <b>v</b>                  | ~                     | of the criteria spe    | ecified in this box.   |                       |
| ChartField Sort Options    |                           |                       | Personalize   Find   \ | /iew All   🗖   🔣       | First 🕚 1 of 1 🕑 Last |
| *ChartField                | Short Name                | From ChartField Value |                        | To ChartField Value    |                       |
| ACCOUNT                    | Account                   |                       | Q                      |                        | Q 🕂 🗖                 |
| Run Query VT_PO8002 for    | r VTPO8002 output         |                       |                        |                        |                       |
| Save Notify                |                           |                       |                        |                        | Add 🕖 Update/Display  |

#### Enter information on the VT Run Pos8002 page:

- Business Unit GL Enter the Business unit; or use the lookup to select
- Budget Date From Enter desired Budget Date From; or use pop-up calendar to select
- 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
- **REQ Status (box 1)** Choose appropriate expression from the drop-down menu
- REQ Status (box 2) Choose the appropriate REQ status from the drop-down menu
- Chartfield Enter Chartfield or use lookup to select.
- From Chartfield Value Enter From Chartfield Value; or use lookup to select; or Leave field blank to select values from the beginning
- **To Chartfield Value** Enter From Chartfield Value; or use lookup to select; or Leave field blank to select values from the beginning

| Vt Run Pos8002    |                      |                           |                          |                             |                                      |                  |
|-------------------|----------------------|---------------------------|--------------------------|-----------------------------|--------------------------------------|------------------|
| Run Co<br>Lar     | ntrol ID<br>nguage ( | Run_VTPO8002<br>English v | Report                   | Manager Process Monitor     | Run                                  |                  |
| Report Request P  | aramet               | ers                       |                          |                             |                                      |                  |
| Business Unit GL: | 021                  | 40 🔍 *Budget Date         | From: 07/01/2022 ii *To: | 06/30/2023                  |                                      |                  |
| Remaining Amour   | nt: <                | Approv                    | 0.000<br>ed v            | This report will return da  | ata meeting either<br>I in this box. |                  |
| ChartField Sort   | Options              | 3                         |                          | Personalize   Find   View A | II   💷   📑 🛛 First                   | 🕚 1 of 1 🕑 Last  |
| *ChartField       |                      | Short Name                | From ChartField Value    | To Cha                      | artField Value                       |                  |
| ACCOUNT           | Q                    | Account                   |                          | Q                           |                                      | Q + -            |
| Run Query VT_PC   | 08002 fo             | r VTPO8002 output         |                          |                             |                                      |                  |
| 🖷 Save 🔛 Notify   | 1                    |                           |                          |                             | Add                                  | 🔊 Update/Display |

#### **Click Save button**

**Click Run button** 

#### The Process Scheduler Request page displays:

| Proce  | ss Scheduler Request           |              |   |           |         |              | 2    |  |
|--|--------------------------------|--------------|---|-----------|---------|--------------|------|--|
|  |                                |              |   |           |         |              | Help |  |
|  | User ID DBROCHU                |              | Run Control ID                                | Run_VTPO8 | 3002    |              |      |  |
|  | Server Name                    | ∨ Ru         | ✓ Run Date 01/23/2024 3                       |           |         |              |      |  |
|  | Recurrence                     | → Ru         | Run Time 1:46:08PM Reset to Current Date/Time |           |         |              |      |  |
|  | Time Zone                      |              |   |           |         |              |      |  |
| Proce  | ess List                       |              |   |           |         |              |      |  |
| Select   | Description                    | Process Name | Process Type                                  | *Type     | *Format | Distribution |      |  |
| Image: A start of the start | VT Requisition Budget Activity | VTP08002     | SQR Report                                    | Web       | SPF     | Distribution |      |  |
|  | VT Requisition Budget Activity | VTPO8002     | SQR Report                                    | Web       | SPF     | Distribution |      |  |
|  |                                |              |   |           |         |              |      |  |
|  |                                |              |   |           |         |              |      |  |
| OK   | Cancel                         |              |   |           |         |              |      |  |

#### On the Process Scheduler Request page, select:

- **Type** Choose desired value Web is recommended
- Format Default is SPF

#### **Click the OK button**

## The VtRun Pos8002 page displays with your Process Instance

| Vt Run Pos8002              |                                    |
|-----------------------------|------------------------------------|
| Run Control ID Run_VTPO8002 | Report Manager Process Monitor Run |
| Language English 🗸          | Process Instance:12437313          |

#### Click the **Process Monitor** link

#### The Process List page displays:

| Proces                | ss List S   | Server List |                |              |                 |         |                          |            |                        |                        |            |
|-----------------------|---|-------------|----------------|--------------|-----------------|---------|--------------------------|------------|------------------------|------------------------|------------|
| View Process Requests |   |             |                |              |                 |         |                          |            |                        |                        |            |
| User                  | ID DBROCH   | υQ          | Туре           | ✓ Last       | <b>~</b>        | 20      | Minutes v Refresh        |            |                        |                        |            |
| Serv                  | er 🦳  | ~           | Name           | Q Instan     | ice             | Range   | Clear                    |            |                        |                        |            |
| Run S                 | Run Status 🔹 Distribution Status 🗳 🗹 Save On Refresh Report Manager Reset |             |                |              |                 |         |                          |            |                        |                        |            |
|                       |   |             |                |              |                 |         |                          |            |                        |                        |            |
| ✓ Proces              | ss List   |             |                |              |                 |         |                          |            |                        |                        |            |
|                       | ٤   |             |                |              |                 |         |                          |            | < < 1-2 of 2           | $2 \sim \rightarrow 2$ | > View All |
| Select                | Instance  | Seq.        | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time            | Run Status | Distribution<br>Status | Details                | Actions    |
|                       | 12437313  |             | Run_VTPO8002   | SQR Report   | VTPO8002        | DBROCHU | 01/23/2024 1:46:08PM EST | Success    | Posted                 | Details                | ✓Actions   |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

• Note the Process Instance Number (example: 12437313)

## Go to Navigation (Path) to the Query: Reporting Tools > Query > Query Viewer

#### The Query View page displays: Type "VT\_PO8002"

#### **Click the Search Button**

| Query Viewer  |                       |        |           |                |                 |               |          |                         |                     |  |
|---|-----------------------|--------|-----------|----------------|-----------------|---------------|----------|-------------------------|---------------------|--|
| Enter any information you have and click Search. Leave fields blank for a list of all values. |                       |        |           |                |                 |               |          |                         |                     |  |
| *Search By  | Query Name v begins w | ith    | VT_PO8002 |                |                 |               |          |                         |                     |  |
| Search  | Advanced Search       |        |           |                |                 |               |          |                         |                     |  |
| Search Results  |                       |        |           |                |                 |               |          |                         |                     |  |
| *Folder View  | All Folders v         |        |           |                |                 |               |          |                         |                     |  |
| Query   |                       |        |           |                |                 |               |          |                         |                     |  |
| E, Q  |                       |        |           |                |                 |               |          | < 1-1 of 1 v > >        | View All            |  |
| Query Name  | Description           | Owner  | Folder    | Run to<br>HTML | Run to<br>Excel | Run to<br>XML | Schedule | Definitional References | Add to<br>Favorites |  |
| VT_PO8002   | RUN PROCESS FIRST     | Public |           | HTML           | Excel           | XML           | Schedule | Lookup References       | Favorite            |  |

## Click the *Excel* hyperlink

The query prompt page will display: Enter or select from the lookup the Process Instance from previous step:

| VT_PO8002 - RUN PROCESS FIRST |  |  |  |  |  |  |  |  |
|-------------------------------|--|--|--|--|--|--|--|--|
| *Process Instance 12437313 Q  |  |  |  |  |  |  |  |  |
| View Results                  |  |  |  |  |  |  |  |  |

(Note: If your report has no results your process instance will not be selectable and will return a message saying that it was an invalid value).

Click View Results and Open the Excel file.

#### **Example of Report Output:**

| best         Degle layout         Oracle         Degle layout         De  | AutoS      | save 👓 🖡                       | <u>ه د د</u> 🗄 | ÷ 🕄 ۲                         |                                | VT_PO8002_1              | 92968989 | lalar V                    |                       | ه م          | earch                |                                 |                          |                           |             | 9                      | Bro  | chu, Danielle 🛞 |                             |
|--|------------|--------------------------------|----------------|-------------------------------|--------------------------------|--------------------------|----------|----------------------------|-----------------------|--------------|----------------------|---------------------------------|--------------------------|---------------------------|-------------|------------------------|--|-----------------|-----------------------------|
| View         View <th< td=""><td>File</td><td>Home</td><td>Insert Pr</td><td>age Layout Form</td><td>ulas Data</td><td>Review Vie</td><td>N AV</td><td>itomate H</td><td>lelp</td><td></td><td>-7</td><td></td><td></td><td></td><td></td><td></td><td></td><td>Γ</td><td>모 Comments 🖻 Share 👻</td></th<>  | File       | Home                           | Insert Pr      | age Layout Form               | ulas Data                      | Review Vie               | N AV     | itomate H                  | lelp                  |              | -7                   |                                 |                          |                           |             |                        |  | Γ               | 모 Comments 🖻 Share 👻        |
| Visit         Fort         Fort <t< td=""><td>Paste<br/>*</td><td>X Cut<br/>Copy →<br/>Sormat Pair</td><td>arial<br/>B</td><td>- 10<br/>I <u>U</u> -  ⊞ -   Ø</td><td>- A^ A   ≡ =<br/>- <u>A</u> - ≡</td><td>= <b>=</b> ≫~<br/>= = ⊡ =</td><td>ê₿ Wr</td><td>rap Text<br/>Ierge &amp; Center</td><td>General<br/>* \$ * % 9</td><td></td><td>Conditie<br/>Formatti</td><td>onal Format as<br/>ing ~ Table ~</td><td>Normal Bar<br/>Neutral Ca</td><td>d Good<br/>Iculation Check</td><td>Cell 🗸</td><td>Insert Delete Format</td><td>AutoSum * AV<br/>Fill * Sort &amp; Fii<br/>Clear * Filter * Se</td><td>D Sensitivit</td><td>y Add-ins Document<br/>Cloud</td></t<>  | Paste<br>* | X Cut<br>Copy →<br>Sormat Pair | arial<br>B     | - 10<br>I <u>U</u> -  ⊞ -   Ø | - A^ A   ≡ =<br>- <u>A</u> - ≡ | = <b>=</b> ≫~<br>= = ⊡ = | ê₿ Wr    | rap Text<br>Ierge & Center | General<br>* \$ * % 9 |              | Conditie<br>Formatti | onal Format as<br>ing ~ Table ~ | Normal Bar<br>Neutral Ca | d Good<br>Iculation Check | Cell 🗸      | Insert Delete Format   | AutoSum * AV<br>Fill * Sort & Fii<br>Clear * Filter * Se | D Sensitivit    | y Add-ins Document<br>Cloud |
| A         B         C         D         E         F         G         H         J         X         L         M         N         O         P         Q         R         S         T         U         V           2         Process Instance Dataleses Unit Judieses Unit  | 0          | Clipboard                      | rsi -          | Font                          | 5                              | Aligr                    | iment    |                            | Fa Number             | r <u>s</u> i |                      |                                 | Styles                   |                           |             | Cells                  | Editing  | Sensitivity     | Add-ins Adobe 🔨             |
| A         B         C         D         E         F         G         H         I         J         K         L         M         N         O         P         Q         R         S         T         U         V         F           1         RUM ROCESSE 11         Business Unit G1.         Req D         Req D         Record Information Subscription         Display 100 (100 (100 (100 (100 (100 (100 (100  | A1         |                                | × ✓            | 률 RUN PROC                    | ESS FIRST                      |                          |          |                            |                       |              |                      |                                 |                          |                           |             |                        |  |                 | · · · ·                     |
| BARNACCESS [ 154         Control of the stands unit of the file manual barnes unit of the file manual barnes unit of the stands and the sta                                 |            | A                              | в              |                               |                                |                          |          |                            |                       |              |                      |                                 |                          |                           |             |                        |  |                 | u j v 🖬                     |
| Porces         Instance Burine Sunti         Busines Unit         Busines Un   | 1 RUN      | PROCESS F                      | 154            |                               |                                |                          |          |                            |                       |              |                      |                                 |                          |                           |             |                        |  |                 |                             |
| 1         1.44733 02140         00140         000000155 C         1<   | 2 Pror     | cess Instance                  | Business U     | nit Business Unit C           | JL Req ID                      | Req Status Lir           | .ie Sche | d Num Distri*              | b Line Num DeptID     | Class Pr     | oj/Grt F             | Fund Account                    | Budget Date From         | Budget Date To Prov       | gram Vendor | ID Original REQ Amount | Liquidated Amount  | O Amount Rem    | naining Amount Requester    |
| 1          | 3          | 12437313                       | 02140          | 02140                         | 0000001050                     | C                        | 1        | 1                          | 1                     |              | _                    | 522430                          | 7/1/2022                 | 6/30/2023                 |             | 3996.00                | 3996.000   | 0.000           | 0.000 AGEE                  |
| S         1243731         02140         70140         7000000051         C         2         1         1         52440         71/202         6/30/2023         0.00         0.000 <td>4</td> <td>12437313</td> <td>02140</td> <td>02140</td> <td>0000001051 (</td> <td>C</td> <td>1</td> <td>1</td> <td>1</td> <td></td> <td></td> <td>522440</td> <td>7/1/2022</td> <td>6/30/2023</td> <td></td> <td>31420.00</td> <td>31420.000</td> <td>38418.400</td> <td>0.000 AGEE</td>   | 4          | 12437313                       | 02140          | 02140                         | 0000001051 (                   | C                        | 1        | 1                          | 1                     |              |                      | 522440                          | 7/1/2022                 | 6/30/2023                 |             | 31420.00               | 31420.000  | 38418.400       | 0.000 AGEE                  |
| G         1243731 02140         00140         0000001651         C         3         1         1         52440         71/202         6/3/0223         0.00         0.0  | 5          | 12437313                       | 02140          | 02140                         | 0000001051                     | C                        | 2        | 1                          | 1                     |              |                      | 522440                          | 7/1/2022                 | 6/30/2023                 |             | 0.00                   | 0.000  | 0.000           | 0.000 AGEE                  |
| 2         1243731         02140         00140         0000001651         c         4         1         1         52440         71/202         6/30/2021         0.00         0.000 <td>6</td> <td>12437313</td> <td>02140</td> <td>02140</td> <td>0000001051 (</td> <td>С</td> <td>3</td> <td>1</td> <td>1</td> <td></td> <td></td> <td>522440</td> <td>7/1/2022</td> <td>6/30/2023</td> <td></td> <td>0.00</td> <td>0.000</td> <td>0.000</td> <td>0.000 AGEE</td>   | 6          | 12437313                       | 02140          | 02140                         | 0000001051 (                   | С                        | 3        | 1                          | 1                     |              |                      | 522440                          | 7/1/2022                 | 6/30/2023                 |             | 0.00                   | 0.000  | 0.000           | 0.000 AGEE                  |
| E         1.447731         02.40         071.40         000000000000000000000000000000000000   | 7          | 12437313                       | 02140          | 02140                         | 0000001051 (                   | C                        | 4        | 1                          | 1                     |              |                      | 522440                          | 7/1/2022                 | 6/30/2023                 |             | 0.00                   | 0.000  | 0.000           | 0.000 AGEE                  |
| 9         1248733         02140         7000001052         1         1         1         52000         71/2022         6/9/0223         53.4.35         51.4.300         448-950         0.000 AGEE           11         12487313         02140         7000001052         2         1         1         522600         71/2022         6/9/0223         51.8.35         51.49.30         449.800         0.000 AGEE           12         12487313         021.40         7000001054         2         1         1         522600         71/2022         6/9/0203         1198.00         138.00         0.000         0.000 AGEE           12         1248731         021.40         7000001054         2         3         1         1         522400         71/2022         6/9/0203         138.00         138.00         0.000         0.000 AGEE           1248731         021.40         7000001054         C         5         1         1         522400         71/2022         6/9/0203         1496.00         1496.00         0.000         0.000 AGEE           1248731         021.40         7000001054         C         5         1         1         522400         71/1022         6/9/02023         286.00         286.00   | 8          | 12437313                       | 02140          | 02140                         | 0000001051                     | C                        | 5        | 1                          | 1                     |              |                      | 522440                          | 7/1/2022                 | 6/30/2023                 |             | 6998.40                | 6998.400   | 0.000           | 0.000 AGEE                  |
| D1         1247731         02140         00140         0000000050         c         2         1         1         52000         7/1/202         6/3/02031         5149.350         5149.350         0.000         0.000 AGEE           12         1247731         02140         00140         0000001654         2         1         1         522400         7/1/202         6/3/02031         138.00         138.00         0.000         <  | 9          | 12437313                       | 02140          | 02140                         | 0000001052                     | С                        | 1        | 1                          | 1                     |              |                      | 522600                          | 7/1/2022                 | 6/30/2023                 |             | 514.95                 | ة 514.950  | 4449.950        | 0.000 AGEE                  |
| 11         1244731         02140         70140         700000164 (C         1         522400         71/1/202 (F39/2023)         138.00         138.00         0.000         0.000 (HRSH           12         1243731         52240         70140         700000164 (C         3         1         1         522400         71/1/202 (F39/2023)         138.00         138.00         0.000         0.000 (HRSH           12         1243731         52240         70140         700000164 (C         5         1         1         522400         71/1/202 (F39/2023)         498.00         498.00         0.000         0.000 (HRSH           12         1243731         52240         71/1/202 (F39/2023)         788.00         288.00         0.000         0.000 (HRSH           12         1243731         52240         71/1/202 (F39/2023)         288.00         288.00         0.000         0.000 (HRSH   | 10         | 12437313                       | 02140          | 02140                         | 0000001052 (                   | с                        | 2        | 1                          | 1                     |              |                      | 522600                          | 7/1/2022                 | 6/30/2023                 |             | 5149.95                | ة 5149.950   | 0.000           | 0.000 AGEE                  |
| 1242731         1242731 <t< td=""><td>11</td><td>12437313</td><td>02140</td><td>02140</td><td>0000001054</td><td>С</td><td>1</td><td>1</td><td>1</td><td></td><td></td><td>522400</td><td>7/1/2022</td><td>6/30/2023</td><td></td><td>1198.00</td><td>1198.000</td><td>0.000</td><td>0.000 KIRISH</td></t<>  | 11         | 12437313                       | 02140          | 02140                         | 0000001054                     | С                        | 1        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 1198.00                | 1198.000   | 0.000           | 0.000 KIRISH                |
| 131         1243731         02140         700000164 (C         3         1         1         52400         71/1/2022         (F/30/2023)         136.00         136.00         0.000   | 12         | 12437313                       | 02140          | 02140                         | 0000001054 /                   | c                        | 2        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 38.00                  | 38.000   | 0.000           | 0.000 KIRISH                |
| 1243731         02140         02140         000000054         c         4         1         52400         7/1/202         6/30/2023         196.00         196.00         0.000         0.000         NURSH           10         1243731         02140         000000054         C         5         1         1         52400         7/1/202         6/30/2023         4098.00         0.000         0.000         NURSH           10         1243731         02140         000000054         C         6         1         1         522400         7/1/202         6/30/2023         788.00         0.000         0.000         NO00         0.000         NO00  | 13         | 12437313                       | 02140          | 02140                         | 0000001054 /                   | c                        | 3        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 158.00                 | 158.000  | 0.000           | 0.000 KIRISH                |
| 131         1243733         02140         7000001054         c         5         1         1         52200         77/1/022         6/30/2033         4498.00         4098.00         0.000 <th< td=""><td>14</td><td>12437313</td><td>3 02140</td><td>02140</td><td>0000001054</td><td>c</td><td>4</td><td>1</td><td>1</td><td></td><td></td><td>522400</td><td>7/1/2022</td><td>6/30/2023</td><td></td><td>196.00</td><td>196.000</td><td>0.000</td><td>0.000 KIRISH</td></th<>  | 14         | 12437313                       | 3 02140        | 02140                         | 0000001054                     | c                        | 4        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 196.00                 | 196.000  | 0.000           | 0.000 KIRISH                |
| 1343731         02140         50140         500000165 (         6         1         52400         7/1/202         6/30/2021         786.00         286.00         0.000         0.000 (HIRSH           13         1243731         52140         50140         50000165 (         7         1         1         522400         7/1/2022         6/30/2023         288.00         288.00         0.000         0.000 (HIRSH           13         1243731         52140         50140         500000165 (         8         1         1         522400         7/1/2022         6/30/2023         288.00         288.00         0.000         0.000 (HIRSH           12         1243731         52140         50140         500000165 (         1         1         522400         7/1/2022         6/30/2023         285.00         285.00         0.000         0.000 (HIRSH           12         1497313         52140         50140         500000165 (         1         1         52100         7/1/2022         6/30/2023         2450.00         2500.00         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000         0.000  | 15         | 12437313                       | 02140          | 02140                         | 0000001054                     | c .                      | 5        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 4098.00                | 4098.000   | 0.000           | 0.000 KIRISH                |
| 128         128         72         128         52.000         71/1022         6/30/203         28.000         2.0.000         0.000 <th< td=""><td>16</td><td>12437313</td><td>02140</td><td>02140</td><td>0000001054 /</td><td>c</td><td>6</td><td>1</td><td>1</td><td></td><td></td><td>522400</td><td>7/1/2022</td><td>6/30/2023</td><td></td><td>798.00</td><td>798.000</td><td>0.000</td><td>0.000 KIRISH</td></th<>  | 16         | 12437313                       | 02140          | 02140                         | 0000001054 /                   | c                        | 6        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 798.00                 | 798.000  | 0.000           | 0.000 KIRISH                |
| 10         12477313         02140 <th< td=""><td>17</td><td>12437313</td><td>102140</td><td>02140</td><td>0000001054</td><td>c.</td><td>7</td><td>1</td><td>1</td><td></td><td></td><td>522400</td><td>7/1/2022</td><td>6/30/2023</td><td></td><td>298.00</td><td>298.000</td><td>0.000</td><td>0.000 KIBISH</td></th<>  | 17         | 12437313                       | 102140         | 02140                         | 0000001054                     | c.                       | 7        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 298.00                 | 298.000  | 0.000           | 0.000 KIBISH                |
| 103         12437731         021.40         701.40         7000001165 (         9         1         1         52.8200         71/17022         6/39/2023         258.00         258.00         0.0000         10.000 (HIBH           12         12437731         021.40         000001165 (         10         1         1         52.8200         71/17022         6/39/2023         24398.00         258.000         0.0000 (HIBH           12         12437731         021.40         051.40         0000001165 (         11         1         1         52.8400         71/17022         6/39/2023         2440.00         410.000         0.000         0.000         0.000         0.000         0.000         N.000         N.000         0.000         N.000         0.000         N.000         N.000 <td>18</td> <td>12437313</td> <td>102140</td> <td>02140</td> <td>0000001054</td> <td>c .</td> <td>8</td> <td>1</td> <td>1</td> <td></td> <td></td> <td>522400</td> <td>7/1/2022</td> <td>6/30/2023</td> <td></td> <td>4134.00</td> <td>4134.000</td> <td>0.000</td> <td>0.000 KIBISH</td>   | 18         | 12437313                       | 102140         | 02140                         | 0000001054                     | c .                      | 8        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 4134.00                | 4134.000   | 0.000           | 0.000 KIBISH                |
| 20         12477312         02140         00100         000000155 C         1         1         52100         171/2022         6780/2023         2588.00         0.000   | 19         | 12437313                       | 102140         | 02140                         | 000001054                      | c l                      | 9        | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 258.00                 | 258.000  | 0.000           | 0.000 KIBISH                |
| Date         Date <thdate< th="">         Date         Date         <thd< td=""><td>20</td><td>12437313</td><td>02140</td><td>02140</td><td>0000001054</td><td>c .</td><td>10</td><td>1</td><td>1</td><td></td><td></td><td>522400</td><td>7/1/2022</td><td>6/30/2023</td><td></td><td>26398.00</td><td>26398.000</td><td>0.000</td><td>0.000 KIRISH</td></thd<></thdate<>  | 20         | 12437313                       | 02140          | 02140                         | 0000001054                     | c .                      | 10       | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 26398.00               | 26398.000  | 0.000           | 0.000 KIRISH                |
| 12         12477313         02140         000000154         12         1         520100         71/12022         6/30/2023         2500.00         2.0000         0.000  | 21         | 12437313                       | 102140         | 02140                         | 0000001054                     | c l                      | 11       | 1                          | 1                     |              |                      | 522400                          | 7/1/2022                 | 6/30/2023                 |             | 4100.00                | 4100.000   | 0.000           | 0.000 KIBISH                |
| 1242713         52140         521410         521100         71/17222   | 22         | 12437313                       | 102140         | 02140                         | 0000001054                     | é                        | 12       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/30/2023                 |             | 2500.00                | 2500.000   | 0.000           | 0.000 KIBISH                |
| 23         1.449733 02140         001400         0000001054         C         1.4         1         22010         71/12022         6/30/2023         334.00         344.00         0.000   | 23         | 12437313                       | 02140          | 02140                         | 0000001054                     | -                        | 13       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/30/2023                 |             | 8400.00                | 8400.000   | 0.000           | 0.000 KIRISH                |
| Constraint         Constraint <thconstraint< th="">         Constraint         Constrai</thconstraint<>  | 24         | 12437313                       | 02140          | 02140                         | 0000001054                     | · ·                      | 14       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/30/2023                 |             | 354.00                 | 354.000  | 0.000           | 0.000 KIRISH                |
| 20         1243/33         02140         0000000054         C         1         2         1         20000         1/1/2022         6/30/2023         12500.00         120000         0.000   | 24         | 12437313                       | 02140          | 02140                         | 000001054                      | -                        | 15       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/30/2023                 |             | 500.00                 | 500.000  | 0.000           | 0.000 KIRISH                |
| Cold         Deb 3/3 U2140         OL140         Deb00000164 L         A         A         Accurate         If years          If years<   | 25         | 12437513                       | 02140          | 02140                         | 000001054                      | -                        | 15       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/20/2023                 |             | 12500.00               | 12500.000  | 0.000           | 0.000 KIRISH                |
| 2/2         124/9733 02140         001400         0000000054         1         1         320000         //1/2022         0/930/2023         9395.000         9305.000         0.0000         0.000         RRSH           20         12497333 02140         02140         0000000054         C         18         1         1         520100         71/1/2022         6/30/2023         9395.000         9.0000         0.000         0.000         0.000         RRSH           20         12497313 02140         02140         0000001054         C         19         1         520100         71/1/2022         6/30/2023         99575.00         9.000         0.000         RRSH   | 20         | 12457513                       | 02140          | 02140                         | 000001054                      | -                        | 17       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/20/2025                 |             | 12.00.00               | 22500.000  | 0.000           | 0.000 KIRISH                |
| 22 1243/313 02140 0.0140 0.0000000545 L 10 1 1 220000 //1/2022 9/30/0003 520000 20000 00000 0000 0000 0000 0   | 27         | 12457513                       | 02140          | 02140                         | 000001054 0                    |                          | ./       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/20/2023                 |             | 22030.00               | 22050.000  | 0.000           | 0.000 KIRISH                |
| 22 12437313 02140 02140 0000001054 C 19 1 1 1 520100 // 1/ 2022 0/ 30/ 2023 90/5.00 90/5.00 90/5.00 0.0000 0.000 0.00000 | 28         | 12437313                       | 02140          | 02140                         | 000001054                      | <u>-</u> -               | 18       | 1                          | 1                     |              |                      | 520100                          | 7/1/2022                 | 6/30/2023                 |             | 9350.00                | 9330.000   | 0.000           | 0.000 KIRISH                |
|  | 29         | 12437315                       | 02140          | 02140                         | 0000001054 C                   | 2                        | 19       | 1                          | 4                     |              |                      | 520100                          | 7/1/2022                 | 6/30/2023                 |             | 9073.00                | 90/5.000   | 0.000           | 0.000 KIKISH                |

## Requisition to PO Xref (POX1100)

**Possible situations when this report should be run:** This report provides information about selected requisitions and the POs that have been created from them.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Requisition Report > Requisition to PO Xref

Navigator Menu navigation: Purchasing > Requisitions > Reports > PO/Requisition Xref

### Click on the Add a New Value tab

| Requisition to PO XREF      |                          |  |  |  |  |  |  |  |  |
|-----------------------------|--------------------------|--|--|--|--|--|--|--|--|
| Add a New Value             | Q Find an Existing Value |  |  |  |  |  |  |  |  |
| *Run Control ID Run_POX1100 |                          |  |  |  |  |  |  |  |  |

#### **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\_POX1100)

#### **Click the Add Button**

#### The PO/Requisition Xref page displays:

| PO/Requisition Xref                              |                                    |
|--|------------------------------------|
| Run Control ID Run_POX1100<br>Language English v | Report Manager Process Monitor Run |
| Report Request Parameters                        |                                    |
| From Date 19                                     | Through Date                       |
| Save Notify                                      | 📑 Add 🗾 Update/Display             |

## Enter information on the PO/Requisition Xref page:

- From Date Enter desired Froom Date; or use pop-up calendar to select
- Through Date Enter desired Through Date; or use pop-up calendar to select
- **Business Unit** Enter the Business unit; or use the lookup to select; or leave blank for all business units

| PO/Requisition Xref  |                                    |
|--|------------------------------------|
| Run Control ID Run_POX1100<br>Language English v   | Report Manager Process Monitor Run |
| Report Request Parameters  |                                    |
| From Date         07/01/2023         Image: Control of the second | Through Date 12/31/2023            |
| Save Notify  | 📑 Add 🗾 Update/Display             |

#### **Click Save button**

#### **Click Run button**

#### The Process Scheduler Request page displays:

| Process Scheduler Request     |              |                   |            |               |                                  | ×    |
|-------------------------------|--------------|-------------------|------------|---------------|----------------------------------|------|
|                               |              |                   |            |               |                                  | Help |
| User ID DBROCHU               |              | Run Control ID    | Run_POX110 | 00            |                                  |      |
| Server Name                   | ∨ Ru         | n Date 01/23/2024 | 31         |               |                                  |      |
| Recurrence                    | → Ru         | n Time 2:19:28PM  |            | Reset to Curr | ent Date/Time                    |      |
| Time Zone                     |              |                   |            |               |                                  |      |
| Process List                  |              |                   |            |               |                                  |      |
| Select Description            | Process Name | Process Type      | *Type      | *Format       | Distribution                     |      |
| Requisition to PO XREF Report | POX1100      | BI Publisher      | Web        | V PDF         | <ul> <li>Distribution</li> </ul> |      |
|                               |              |                   |            |               |                                  |      |
|                               |              |                   |            |               |                                  |      |
|                               |              |                   |            |               |                                  |      |
| OK Cancel                     |              |                   |            |               |                                  |      |

On the Process Scheduler Request page, select:

- **Type** Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

#### **Click the OK button**

## The PO/Requisition Xref page displays with your Process Instance

| PO/Requisition Xref                              |  |
|--|--|
| Run Control ID Run_POX1100<br>Language English v | Report Manager Process Monitor Run Process Instance:12437321 |

## Click the <u>Process Monitor</u> link

### The Process List page displays:

| Proces                                 | ss List  | erver List |                |              |                 |         |                          |  |            |                        |         |            |
|--|--|------------|----------------|--------------|-----------------|---------|--------------------------|--|------------|------------------------|---------|------------|
| View Proc<br>User I<br>Serve<br>Run St | ew Process Requests User ID DBROCHU Q Type V Last V 20 Minutes Refresh Server Name Q Instance Range Clear Run Status Distribution Status V Save On Refresh Report Manager Reset Process List |            |                |              |                 |         |                          |  |            |                        |         |            |
|  |  |            |                |              |                 |         |                          |  |            | < < 1-1 of 1           | l • >   | > View All |
| Select                                 | Instance   | Seq.       | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time            |  | Run Status | Distribution<br>Status | Details | Actions    |
|  | 12437321   |            | Run_POX1100    | BI Publisher | POX1100         | DBROCHU | 01/23/2024 2:19:28PM EST |  | Success    | Posted                 | Details | ✓Actions   |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

## Click on *Report Manager* link, then Click on the Administration tab

| Report Ma   | anager                                  |                  |                       |                         |                    |        |          |         |
|-------------|---|------------------|-----------------------|-------------------------|--------------------|--------|----------|---------|
| List        | Explorer                                | Administration   | Archives              |                         |                    |        |          |         |
| View Repor  | ts For                                  |                  |                       |                         |                    |        |          |         |
| User ID     | DBROCHU Type v Last v 5 Minutes v Refre |                  |                       |                         |                    |        |          | Refresh |
| Status      |   | Y Folder         | ✓ Instance            | to                      |                    | ]      |          |         |
|             |   |                  |                       |                         |                    |        |          |         |
| Report List |   |                  |                       |                         |                    |        |          |         |
|             |   |                  |                       | < <                     | 1-1 of 1 🗸         | · > >  | View All |         |
| Select      | Report<br>ID                            | Prcs<br>Instance | Description           | Request<br>Date/Time    | Format             | Status | Details  |         |
|             | 5514209                                 | 12437321         | POX1100 - POX1100.pdf | 01/23/2024<br>2:20:43PM | Acrobat<br>(*.pdf) | Posted | Details  |         |

Click on <u>POX1100 – POX1100.pdf</u> link

# Example of Report Output

| ORACLE'                                    | Report ID: POX4010<br>User ID: DBROCHU<br>Run Control: Run_POX1100 | PeopleSoft Purchasing<br>REQUISITION TO PO XREF REPORT         |          |      |            |             |                |               |      | Page No. 1<br>Run Date 1/23/2024<br>Run Time 14:20:43 PM |      |          |     |                |
|--|--|--|----------|------|------------|-------------|----------------|---------------|------|--|------|----------|-----|----------------|
| Req Dates Included :<br>Business Unit: 021 |  |  |          |      |            |             | Durchase Order |               |      |  |      |          |     |                |
| ID Lin/Sch/Det Date Itom ID                |  | -<br>Description   | Quantity | ПОМ  |            | Contract ID | Del            | Shin Date     | Lin/ | Sch/D  | et ( | Quantity | CUR | Drice          |
|  |  | Description  | quantity | 0011 | 1010       | Conductio   | 1101           | Ship Date     | Line | 50120  |      | quantity | con | 11100          |
| 0000001101 1                               | 1 1 07/03/2023   | TSU Sprinter<br>Van white built to<br>specifications<br>listed | 1.00     | EA   | 0000053207 |             |                | 0 08/02/2023  | 1    | 1  | 1    | 1.00     | USD | 219,577.2<br>3 |
| Requisition Name:                          | PS-100626  | liotod   |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 0000001102 1                               | 1 1 07/05/2023   | GNSS Data<br>Collection Kit                                    | 8.00     | EA   | 0000053478 |             |                | 0 08/04/2023  | 1    | 1  | 1    | 8.00     | USD | 2,933.27       |
| Requisition Name:                          | PS-100602  | ould the first state   |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 0000001103 1                               | 1 1 07/05/2023   | Crye Precision<br>G3 Combat Pant                               | 24.00    | EA   | 0000053427 |             |                | 0 08/04/2023  | 1    | 1  | 1    | 24.00    | USD | 249.34         |
| Requisition Name:                          | PS-100604  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 2  | 1 1 07/05/2023   | Crye Precision<br>G3 Combat Shirt                              | 24.00    | EA   | 0000053427 |             |                | 0 08/04/2023  | 2    | 1  | 1    | 24.00    | USD | 157.80         |
| Requisition Name:                          | PS-100604  | 00 0011001   |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 3  | 1 1 07/05/2023   | Airflex Combat<br>Knee pad style<br>03                         | 24.00    | EA   | 0000053427 |             |                | 0 08/04/2023  | 3    | 1  | 1    | 24.00    | USD | 44.58          |
| Requisition Name:                          | PS-100604  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 4  | 1 1 07/05/2023   | Shipping   | 1.00     | EA   | 0000053427 |             |                | 0 08/04/2023  | 4    | 1  | 1    | 1.00     | USD | 542.06         |
| Requisition Name:                          | PS-100604  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 0000001104 1                               | 1 1 07/07/2023   | Stove Prop -<br>Steel Class A                                  | 2.00     | EA   | 0000053388 |             |                | 0 08/06/2023  | 1    | 1  | 1    | 2.00     | USD | 1,875.00       |
| Requisition Name:                          | PS-100577  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 2  | 1 1 07/07/2023   | Sofa Prop  | 2.00     | EA   | 0000053388 |             |                | 0 08/06/2023  | 2    | 1  | 1    | 2.00     | USD | 2,755.00       |
| Requisition Name:                          | PS-100577  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 3  | 1 1 07/07/2023   | Bed Prop   | 2.00     | EA   | 0000053388 |             |                | 0 08/06/2023  | 3    | 1  | 1    | 2.00     | USD | 2,975.00       |
| Requisition Name:                          | PS-100577  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
| 4  | 1 1 07/07/2023   | Dining Room Set  | 1.00     | EA   | 0000053388 |             |                | 0 08/06/2023  | 4    | 1  | 1    | 1.00     | USD | 4,435.00       |
| Requisition Name:                          | PS-100577  |  |          |      |            |             | Attention To : | Katie R Irish | h    |  |      |          |     |                |
|  |  |  |          |      | Page 1     | of 4        |                |               |      |  |      |          |     |                |
## Requisition Print (PORQ010)

**Possible situations when this report should be run:** This report provides a hard copy of your requisitions sorted by requisition ID. You can print a single requisition or multiple requisitions.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Requisition Report > Requisition Print

Navigator Menu navigation: Purchasing > Requisitions > Reports > Print Requisition

### Click on the Add a New Value tab

| Requisition Print               |                          |
|---------------------------------|--------------------------|
| Add a New Value                 | Q Find an Existing Value |
| *Run Control ID Run_PORQ010 Add |                          |

### **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\_PORQ010)

## **Click the Add Button**

#### The Print Requisition page displays:

| Print Requisition  |   |
|--|---|
| Run Control ID Run_PORQ010 Report Manag<br>Language English V Specified Language | ger Process Monitor Run<br>O Recipient's Language   |
| Report Request Parameters  |   |
| Business Unit<br>Requisition ID<br>From Date<br>Through Date<br>Requester<br>Q   | Statuses to Include         Approved       Select All         Canceled         Completed         Open         Pending |
| 🔚 Save 🔚 Notify  | NOT On Hold ~   |

#### Enter information on the Print Requisition page:

- **Business Unit** Enter the Business unit; or use the lookup to select; or leave blank
- **Requisition ID** Enter the Requisition ID; or use the lookup to select; or leave blank
- From Date Enter desired From Date; or use pop-up calendar to select
- Through Date Enter desired Through Date; or use pop-up calendar to select
- **Requester** Enter the Requester; or use the lookup to select; or leave blank
- Statuses to Include Select approved, canceled, completed, open, and / or pending. Choose from the drop-down menu the hold status.

| Print Requisition   |   |
|---|---|
| Run Control ID Run_PORQ010 Report Manage English V Specified Language   | ger Process Monitor Run<br>O Recipient's Language   |
| Report Request Parameters   |   |
| Business Unit 01110 Q<br>Requisition ID Q<br>From Date 07/01/2023 3<br>Through Date 12/31/2023 3<br>Requester Q | Statuses to Include         Approved       Select All         Canceled         Completed         Open         Pending |
| Save Notify   | 📑 Add 🖉 Update/Display  |

## **Click Run button**

#### The Process Scheduler Request page displays:

| Process Scheduler Request |                         |                   |            |                |                                  | ×    |
|---------------------------|-------------------------|-------------------|------------|----------------|----------------------------------|------|
|                           |                         |                   |            |                |                                  | Help |
| User ID DBROCHU           |                         | Run Control ID    | Run_PORQ01 | 0              |                                  |      |
| Server Name               | ∼ Ru                    | n Date 01/23/2024 | 31         |                |                                  |      |
| Recurrence                | <ul><li>✓ Rur</li></ul> | n Time 2:32:10PM  | R          | leset to Curre | ent Date/Time                    |      |
| Time Zone                 |                         |                   |            |                |                                  |      |
| Process List              |                         |                   |            |                |                                  |      |
| Select Description        | Process Name            | Process Type      | *Туре      | *Format        | Distribution                     |      |
| Requisition Print SQR     | PORQ010                 | SQR Report        | Web 🗸      | PDF ·          | <ul> <li>Distribution</li> </ul> |      |
|                           |                         |                   |            |                |                                  |      |
| OK Cancel                 |                         |                   |            |                |                                  |      |

#### On the Process Scheduler Request page, select:

- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

## Click the OK button. The Print Requisition page displays with your Process Instance

| Print Requisition                                |                                   |  |  |  |  |
|--|-----------------------------------|--|--|--|--|
| Run Control ID Run_PORQ010<br>Language English v | Report Manager Specified Language | Process Monitor Run O Recipient's Language |  |  |  |
|  |                                   | Process Instance:12437322                  |  |  |  |

#### Click the *Process Monitor* link, The Process List page displays:

| Proces   | ss List                              | Gerver List |                   |                            |                 |           |                          |            |                        |         |          |
|----------|--------------------------------------|-------------|-------------------|----------------------------|-----------------|-----------|--------------------------|------------|------------------------|---------|----------|
| View Pro | cess Reques                          | sts         |                   |                            |                 |           |                          |            |                        |         |          |
| User     | ID DBROCH                            | υQ          | Туре              | <ul> <li>✓ Last</li> </ul> | ~               | 5         | Minutes v Refres         | sh         |                        |         |          |
| Serv     | er                                   | ~           | Name              | Q Insta                    | nce             | Range     | Clear                    | r          |                        |         |          |
| Run S    | tatus                                | ~           | Distribution Stat | us                         | Save O          | n Refresh | Report Manager Rese      | t          |                        |         |          |
|          |                                      |             |                   |                            |                 |           |                          |            |                        |         |          |
| ~ Proces | ss List                              |             |                   |                            |                 |           |                          |            |                        |         |          |
| E, C     | □□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□ |             |                   |                            |                 |           |                          |            |                        |         |          |
| Select   | Instance                             | Seq.        | Run Control ID    | Process Type               | Process<br>Name | User      | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions  |
|          | 12437322                             |             | Run_PORQ010       | SQR Report                 | PORQ010         | DBROCHU   | 01/23/2024 2:32:10PM EST | Success    | Posted                 | Details | ✓Actions |

## Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

## Click on Report Manager link, then Click on the Administration tab

| Report M    | lanager                       |                  |            |             |   |      |   |                         |                    |        |          |         |
|-------------|-------------------------------|------------------|------------|-------------|---|------|---|-------------------------|--------------------|--------|----------|---------|
| List        | Explorer                      | Adminis          | stration   | Archives    |   |      |   |                         |                    |        |          |         |
| View Repo   | orts For                      |                  |            |             |   |      |   |                         |                    |        |          |         |
| User ID     | DBROCH                        | IU I             | Гуре       |             | ~ | Last | ~ | ]                       | 5 Days             | ; ~    |          | Refresh |
| Status      | Status V Folder V Instance to |                  |            |             |   |      |   |                         |                    |        |          |         |
|             |                               |                  |            |             |   |      |   |                         |                    |        |          |         |
| Report List |                               |                  |            |             |   |      |   |                         |                    |        |          | 1       |
| E, Q        |                               |                  |            |             |   |      | < | < 1-47 of               | 47 ~               | >      | View All |         |
| Select      | Report<br>ID                  | Prcs<br>Instance | Descripti  | on          |   |      |   | Request<br>Date/Time    | Format             | Status | Details  |         |
|             | 5514210                       | 12437322         | Requisitio | n Print SQR |   |      |   | 01/23/2024<br>2:33:10PM | Acrobat<br>(*.pdf) | Posted | Details  |         |

Click on <u>Requisition Print SQR</u> link

# Example of Report Output

|           |                      |  | Requisition | n  |                             |                       |
|-----------|----------------------|--|-------------|--|-----------------------------|-----------------------|
| Ship To:  | : Ager<br>133<br>Mon | ncy of Digital Services<br>State St<br>tpelier VT 05633  |             | Business Unit:<br>Req ID:<br>0000000014<br>Requisition Name<br>0000000014<br>Requester | 01110<br>Date<br>11/21/2018 | APPROVED<br>Page<br>1 |
|           |                      |  |             | Karen L Symonds<br>Requester Signature   |                             | USD                   |
| Line-Schd | Item                 | Description  | Mfg ID      | Quantity UDM   | Price E                     | Extended Amt Due Date |
| 1-1       |                      | Lasermate 20<br>Offine - Base<br>w/Nester Serial<br>#379 |             | 2.0000 EA  | 50.00                       | 100.00 11/21/2018     |
|           | Buyer:<br>Attn:      | Linda T Wortman<br>Karen L Symonds                       |             |  |                             |                       |
|           |                      |  |             | Line Total:  |                             | 100.00                |
|           |                      |  |             | Total Requisition Amount:  |                             | 100.00                |

## **Request for Quotes**

# REQ/RFQ Cross Reference (POX6100)

**Possible situations when this report should be run:** This report provides a cross-reference between requests for quotes and the requisitions created from those requests for quotes.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Request for Quotes > Req/RFQ Cross Reference

Navigator Menu navigation: Purchasing > Requests for Quotes > Requisition/RFQ XRef Report

## Click on the Add a New Value tab

| REQ/RFQ Cross Reference     |                          |  |  |  |  |  |  |
|-----------------------------|--------------------------|--|--|--|--|--|--|
| Add a New Value             | Q Find an Existing Value |  |  |  |  |  |  |
| *Run Control ID Run_POX6100 |                          |  |  |  |  |  |  |

### **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\_POX6100)

## **Click the Add Button**

#### The Requisition/RFQ Xref Report page displays:

| Requisition/RFQ Xref Report                      |                                    |
|--|------------------------------------|
| Run Control ID Run_POX6100<br>Language English v | Report Manager Process Monitor Run |
| Report Request Parameters                        |                                    |
| Business Unit                                    |                                    |
| From Date  | Through Date                       |
| 🔚 Save 🖹 Notify                                  | 📑 Add 🗾 Update/Display             |

Enter information on the Requisition/RFQ Xfer Report page:

- **Business Unit** Enter the Business unit or use the lookup to select or leave blank forall business units
- From Date Enter desired Budget Date From or use pop-up calendar to select
- Through Date Enter desired Budget Date To or use pop-up calendar to select

| Requisition/RFQ Xref Report |                                    |  |  |  |  |  |  |  |  |  |
|-----------------------------|------------------------------------|--|--|--|--|--|--|--|--|--|
| Run Control ID Run_POX6100  | Report Manager Process Monitor Run |  |  |  |  |  |  |  |  |  |
| Report Request Parameters   |                                    |  |  |  |  |  |  |  |  |  |
| Business Unit 02140         |                                    |  |  |  |  |  |  |  |  |  |
| From Date 07/01/2022        | Through Date 06/30/2023            |  |  |  |  |  |  |  |  |  |
| Save Notify                 | 📑 Add 🕖 Update/Display             |  |  |  |  |  |  |  |  |  |

## **Click Save button**

### **Click Run button**

## The Process Scheduler Request page displays:

| Proce    | ss Scheduler | Request |   |              |       |                 |          |        |         |                                  | ×    |
|----------|--------------|---------|---|--------------|-------|-----------------|----------|--------|---------|----------------------------------|------|
|          |              |         |   |              |       |                 |          |        |         |                                  | Help |
|          | User ID      | DBROCHU |   |              |       | Run Control IE  | Run_POX6 | 6100   |         |                                  |      |
|          | Server Name  |         |   | ~            | Run D | 0ate 01/23/2024 | Ħ        |        |         |                                  |      |
|          | Recurrence   |         |   | ~            | Run T | ime 2:54:24PM   |          | Resett | o Curre | nt Date/Time                     |      |
|          | Time Zone    |         | Q |              |       |                 |          |        |         |                                  |      |
| Proce    | ss List      |         |   |              |       |                 |          |        |         |                                  |      |
| Select   | Description  |         |   | Process Name | e     | Process Type    | *Type    | *For   | mat     | Distribution                     |      |
| <b>~</b> | POX6100      |         |   | POX6100      |       | BI Publisher    | Web      | V PD   | F١      | <ul> <li>Distribution</li> </ul> |      |
|          |              |         |   |              |       |                 |          |        |         |                                  |      |
|          |              |         |   |              |       |                 |          |        |         |                                  |      |
|          |              |         |   |              |       |                 |          |        |         |                                  |      |
| OK       | Cance        | el      |   |              |       |                 |          |        |         |                                  |      |

On the Process Scheduler Request page, select:

- **Type** Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

**Click the OK button** 

| The Requisition/RFQ Xref Report page displa | ys with your Process Instance      |
|---|------------------------------------|
| Requisition/RFQ Xref Report                 |                                    |
| Run Control ID Run_POX6100                  | Report Manager Process Monitor Run |
| Language English 🗸                          | Process Instance:12437331          |

## Click the *Process Monitor* link, The Process List page displays:

| Proces   | ss List S   | erver List |                |              |                 |         |                          |            |                        |         |            |
|----------|---|------------|----------------|--------------|-----------------|---------|--------------------------|------------|------------------------|---------|------------|
| View Pro | cess Reques   | ts         |                |              |                 |         |                          |            |                        |         |            |
| User     | DBROCH  | J Q        | Туре           | ∽ Last       | ~               | 5       | Minutes v Refre          | sh         |                        |         |            |
| Serve    | Server Name Q Instance Range Clear  |            |                |              |                 |         |                          |            |                        |         |            |
| Run St   | Run Status 💙 Distribution Status 💙 🗹 Save On Refresh Report Manager Reset |            |                |              |                 |         |                          |            |                        |         |            |
|          |   |            |                |              |                 |         |                          |            |                        |         |            |
| ~ Proces | s List  |            |                |              |                 |         |                          |            |                        |         |            |
|          | L.  |            |                |              |                 |         |                          |            | < < 1-1 of             | 1 🗸 >   | > View All |
| Select   | Instance  | Seq.       | Run Control ID | Process Type | Process<br>Name | User    | Run Date/Time            | Run Status | Distribution<br>Status | Details | Actions    |
|          | 12437331  |            | Run_POX6100    | BI Publisher | POX6100         | DBROCHU | 01/23/2024 2:54:24PM EST | Success    | Posted                 | Details | ✓Actions   |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

| Report M    | anager       |                  |                       |                         |                    |           |          |         |
|-------------|--------------|------------------|-----------------------|-------------------------|--------------------|-----------|----------|---------|
| List        | Explorer     | Administration   | Archives              |                         |                    |           |          |         |
| View Repo   | rts For      |                  |                       |                         |                    |           |          |         |
| User ID     | DBROCHU      | Туре             | ∽ Last                | ~                       | 5                  | Minutes v |          | Refresh |
| Status      |              | Y Folder         | ✓ Instance            | to                      |                    |           |          |         |
|             |              |                  |                       |                         |                    |           |          |         |
| Report List |              |                  |                       |                         |                    |           |          | -       |
| E Q         |              |                  |                       | < <                     | 1-1 of 1 🗸         | > >       | View All |         |
| Select      | Report<br>ID | Prcs<br>Instance | Description           | Request<br>Date/Time    | Format             | Status    | Details  |         |
|             | 5514218      | 12437331         | POX6100 - POX6100.pdf | 01/23/2024<br>2:55:36PM | Acrobat<br>(*.pdf) | Posted    | Details  |         |

## Click on *Report Manager* link, then Click on the Administration tab

Click on <u>POX6100 – POX6100.pdf</u> link

## Example of Report Output

| 20 Dates Included: 7/1/2018 Thru: 6/30/2019<br>Business Unit: 02140 |  | Run Control ID:     | Run_REQ_RFQ    | Xref | RFQ TO F | REQUISITION X | REF REPORT |  | Run D<br>Run Ti | ate 1/23/20<br>ime 7:59:22 A |
|---|--|---------------------|----------------|------|----------|---------------|------------|--|-----------------|------------------------------|
|   | <sup>3</sup> O Dates Included:<br>Business Unit: | 7/1/2018 T<br>02140 | hru: 6/30/2019 |      |          |               |            |  |                 |                              |

# Dispatch Quotes (PORFQ01)

**Possible situations when this report should be run:** This report provides a hard copy of the request for quote.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Queries tab > Report / Processes pagelets > Request for Quotes > Dispatch Quotes

Navigator Menu navigation: Purchasing > Request for Quotes > Dispatch Quotes

## Click on the Add a New Value tab

| Dispatch Quote Forms        |                          |
|-----------------------------|--------------------------|
| Add a New Value             | Q Find an Existing Value |
| *Run Control ID Run_PORFQ01 |                          |

### **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\_PORFQ01)

## Click the Add Button. The Dispatch Quotes page displays:

| Dispatch Quotes                                  |              |                           |             |                        |                    |                |    |
|--|--------------|---------------------------|-------------|------------------------|--------------------|----------------|----|
| Run Control ID Run_PORFQ01<br>Language English v | Specified La | Report Manager<br>Inguage | Proces      | s Monitor<br>Recipient | Run<br>'s Language |                |    |
| Process Request Parameters                       |              |                           |             |                        |                    |                |    |
| Business Unit                                    | Q            |                           |             |                        |                    |                |    |
| RFQ ID   | Q            |                           |             |                        | Supplier ID        | )              | Q  |
| From Date  | 31           |                           |             |                        | Through Date       | }              | 31 |
| Buyer  | Q            |                           |             |                        | Fax Cover Page     | )              | Q  |
| Miscellaneous Options                            |              | Statuses to Inc           | clude       |                        |                    |                |    |
| Test Dispatch                                    | Dispatched   |                           | Not Dis     | Not Dispatched         |                    |                |    |
|  |              | Dispatch Meth             | iods to Inc | clude                  |                    |                |    |
|  |              | ✓ Print                   |             | EDX                    | 🗹 E-Mail           | 🗸 Phone        |    |
| Save Notify                                      |              |                           |             |                        | 📑 Add              | 🗾 Update/Displ | ay |

### Enter information on the Dispatch Quotes page:

- Business Unit Enter the Business unit or use the lookup to select or leave blank for all business units
- **RFQ ID** Enter RFQ ID or use lookup to select or leave blank for all RFQs
- Supplier ID Enter Supplier ID or use lookup to select or leave blank for all Suppliers
- From Date Enter desired From Date or use pop-up calendar to select
- Through Date Enter desired Through Date or use pop-up calendar to select
- Buyer Enter Buyer or use lookup to select or leave blank for all Buyers
- Fax Cover Page Enter Fax Cover Page or use lookup to select or leave blank for all Fax Cover pages
- **Miscellaneous Options** Select desired Miscellaneous Options or Select none, all or some of the options.
- Statuses to Include Select desired Statuses or Select none, all or some of the options.
- **Dispatch Methods to Include** Select desired Dispatch Methods or Select none, all or some of the options.

| Dispatch Quotes   |   |
|---|---|
| Run Control ID Run_PORFQ01<br>Language English V Spec                 | Report Manager     Process Monitor     Run       cified Language     O Recipient's Language         |
| Process Request Parameters  |   |
| Business Unit 02140 Q<br>RFQ ID 000000341 Q<br>From Date 3<br>Buyer 0 | Supplier ID 0000043710 Q<br>Through Date 19<br>Fax Cover Page Q                                     |
| Miscellaneous Options   | Statuses to Include   |
| Test Dispatch Print Duplicate   | Dispatched       Not Dispatched         Approved       Canceled         Dispatch Methods to Include |
| Save Notify   | Print FAX EDX E-Mail Phone  |

## **Click Save button**

**Click Run button** 

### The Process Scheduler Request page displays:

| Proce  | ss Scheduler   | Request  |                           |                    |           |                |              | ×    |
|--------|----------------|----------|---------------------------|--------------------|-----------|----------------|--------------|------|
|        |                |          |                           |                    |           |                |              | Help |
|        | User ID        | DBROCHU  |                           | Run Control ID     | un_PORFQ0 | 1              |              |      |
|        | Server Name    |          | ∼ Ru                      | Date 01/23/2024    | 31        |                |              |      |
|        | Recurrence     |          | <ul> <li>✓ Run</li> </ul> | Time 3:01:32PM     | R         | eset to Currer | nt Date/Time |      |
|        | Time Zone      | Q        |                           |                    |           |                |              |      |
| Proce  | ess List       |          |                           |                    |           |                |              |      |
| Select | Description    |          | Process Name              | Process Type       | *Type     | *Format        | Distribution |      |
|        | RFQ Dispatch/  | Print    | PORFQ01                   | SQR Report         | Web 🗸     | PDF v          | Distribution |      |
|        | Email          |          | PO_RFQ_EMAIL              | Application Engine | Web 🗸     | TXT v          | Distribution |      |
|        | RFQ dispatch a | & E-mail | RFQDISP                   | PSJob              | (None) 🗸  | (None) v       | Distribution |      |
| Oł     | Cance          | el       |                           |                    |           |                |              |      |

## On the Process Scheduler Request page, select:

- **Select** RFQ Dispatch/Print
- Type Choose desired value Web is recommended
- Format Choose desired value PDF is recommended

## **Click the OK button**

#### The Dispatch Quotes page displays with your Process Instance

| Dispatch Quotes            |                                   |  |
|----------------------------|-----------------------------------|--|
| Run Control ID Run_PORFQ01 | Report Manager Specified Language | Process Monitor Run O Recipient's Language |
|                            |                                   | Process Instance:12437337                  |

## Click the *Process Monitor* link, The Process List page displays:

| Proces                            | ss List     | <u>S</u> erver List |                                   |                          |                        |                         |  |            |                        |            |          |
|-----------------------------------|-------------|---------------------|-----------------------------------|--------------------------|------------------------|-------------------------|--|------------|------------------------|------------|----------|
| View Pro<br>User<br>Serv<br>Run S | cess Reques | sts<br>UQQ<br>v     | Type<br>Name<br>Distribution Stat | Cast     Q     Instar us | v<br>nce<br>2 ■ Save O | 5<br>Range<br>n Refresh | Minutes  Refres Clear Report Manager Reset | h          |                        |            |          |
| E, C                              | 2           |                     |                                   |                          |                        |                         |  |            | < < 1-1 of 1           | <b>v</b> > | View All |
| Select                            | Instance    | Seq.                | Run Control ID                    | Process Type             | Process<br>Name        | User                    | Run Date/Time                              | Run Status | Distribution<br>Status | Details    | Actions  |
|                                   | 12437337    |                     | Run_PORFQ01                       | SQR Report               | PORFQ01                | DBROCHU                 | 01/23/2024 3:01:32PM EST                   | Success    | Posted                 | Details    | ✓Actions |

Click Refresh until the Run Status displays "Success" and the Distribution Status displays "Posted"

Click on *Report Manager* link, then Click on the Administration tab

| Report M                      | lanager      |                  |                    |                         |                    |         |          |         |
|-------------------------------|--------------|------------------|--------------------|-------------------------|--------------------|---------|----------|---------|
| List                          | Explorer     | Administration   | Archives           |                         |                    |         |          |         |
| View Repo                     | orts For     |                  |                    |                         |                    |         |          |         |
| User ID                       | DBROCHU      | Туре             | ∽ La               | st v                    | 5                  | Minutes | •        | Refresh |
| Status V Folder V Instance to |              |                  |                    |                         |                    |         |          |         |
|                               |              |                  | ~                  |                         |                    |         |          |         |
| Report List                   |              |                  |                    |                         |                    |         |          |         |
| E, Q                          |              |                  |                    | <                       | (1-1 of 1)         | ~ > >   | View All |         |
| Select                        | Report<br>ID | Prcs<br>Instance | Description        | Request<br>Date/Time    | Format             | Status  | Details  |         |
|                               | 5514222      | 12437337         | RFQ Dispatch/Print | 01/23/2024<br>3:02:34PM | Acrobat<br>(*.pdf) | Posted  | Details  |         |

Click on <u>RFQ Dispatch/Print</u> link

## **Example of Report Output**

| State of Vermont<br>Return Bid To:<br>Buildings and General Services<br>Office of Purchasing & Contract  | Reque  | est for Quota  | tion   |  |                                  |
|--|--|--|--|--|----------------------------------|
| 109 State St<br>Montpelier VT 05609-3001   |  | Request Quote ID.<br>02140-000000034<br>Payment Terms<br>Net: 30<br>Requisition: 000 | Date<br>1 08/10/2018<br>Date Quote O<br>09/06/2018<br>00000819 | Buyer<br>Steven D Smith<br>pen Closin<br>09/20 | Page<br>1<br>9<br>/2018 16:30:00 |
|  |  | Ship To: DPS - F<br>93 Davi<br>Pittsford<br>United S                                 | ire Academy<br>dson Drive<br>VT 05764<br>States                |  |                                  |
| Line Item Desc   | ription  | UC   | M Quantity   | Unit Price                                     | Extended Amount                  |
| 1 Carg   | o Trailer  | EA   | 1.00   |  |                                  |
| Freight Terms: FOBDEST<br>IN ACCORDANCE WITH THE SF<br>Width: 8 feet<br>Length: minimum 20 feet<br>Interior Height: Minimum 7 feet<br>Body Style: Radius Front/round to<br>14,000 lbs GVW<br>Tandem 7,000 lbs axles<br>14 ply radial tires<br>Spring assisted rear ramp door<br>32" side hinged door on passeng<br>All exterior doors shall be equipp<br>Minimum 24" Aluminum stone gu<br>Rear stabilizing jacks | Ship Via: BEST<br>PECIFICATIONS LISTED B<br>op<br>er side<br>ed with cam lock hardware<br>ard on front | NAY<br>ELOW:<br>or equivalent capable  | of being padlocke  | d.   |                                  |