



## Purchasing Reporting Manual

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## Purchasing Queries

### Purchase Orders

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

VTPOINFO – VT Cust Report of PO Spending	
<b>Purpose</b>	Lists all purchase orders and association contracts and transactions dates for a department within a specified range of amounts
<b>Prompts</b>	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
<b>Columns</b>	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	
<b>Purpose</b>	Lists PO, quantity and price for a specific item purchased for a given business unit, date range, and recyclable status
<b>Prompts</b>	Business unit, item ID, item recycle flag, PO date range
<b>Columns</b>	Item and description, business unit and department name, PO number, PO date, supplier ID and name, PO line, PO quantity, unit of measure, price, recyclable status; also prompted values

VT_CONTRACT_USAGE_REPORT	
<b>Purpose</b>	Lists PO information for a contract used by a specified department during a specified time range
<b>Prompts</b>	Set ID, contract ID, PO date range, PO business unit
<b>Columns</b>	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	
<b>Purpose</b>	Lists PO's that are not fully liquidated and not in a complete or cancelled status
<b>Prompts</b>	Business unit, PO date range
<b>Columns</b>	PO unit, PO NUMBER, PO status, PO date, voucher ID; also prompted date range

VT_MASTER_CONTRACT_VCHR_PO – Contract Activity by Supplier	
<b>Purpose</b>	Lists all contract vouchers and PO's for a supplier along with related contract information
<b>Prompts</b>	Supplier set ID, supplier ID, range of payment dates
<b>Columns</b>	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	
<b>Purpose</b>	Lists all PO's and associated accounting information that has an account other than an expense account
<b>Prompts</b>	GL business unit, range of PO dates
<b>Columns</b>	GL business unit, PO business unit, PO number, account and account description, fund, program, class, project/grant, amount, accounting date

VT_PO_BUYER_ACTIVITY – Count & Amt Distrib Line	
<b>Purpose</b>	Lists all valid (not cancelled) PO's for a buyer within a certain PO business unit and date range
<b>Prompts</b>	Buyer, PO business unit, PO date range
<b>Columns</b>	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	
<b>Purpose</b>	Lists all valid (not cancelled) PO's for a supplier and associated contract information
<b>Prompts</b>	Set ID, supplier ID, PO business unit, PO date range
<b>Columns</b>	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	
<b>Purpose</b>	Lists valid (not cancelled) PO, business unit and associated contract ID for a given inventory item ID and PO date range.
<b>Prompts</b>	Item ID, PO business unit (use % for all), PO date range
<b>Columns</b>	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	
<b>Purpose</b>	Lists PO's with a match status of "T" and associated voucher.
<b>Prompts</b>	PO business unit, PO date range
<b>Columns</b>	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	
<b>Purpose</b>	Lists PO's not received with a receiving required status
<b>Prompts</b>	PO business unit, PO date range
<b>Columns</b>	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	
<b>Purpose</b>	Lists the current status of all PO's within a business unit along with contract information.
<b>Prompts</b>	PO business unit (use % for all), PO date range, GL business unit
<b>Columns</b>	GL business unit, PO business unit, PO date, PO number, PO status, budget check status, PO line, PO description, line amount, contract number

VT_VENDOR_PO_XREF – PO's for a Supplier	
<b>Purpose</b>	Lists all PO's ever created for a particular supplier along with its current status
<b>Prompts</b>	Supplier ID
<b>Columns</b>	PO business unit, PO number, PO date, supplier set ID, supplier number, PO status

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

VT_PO8001– VT PO Budgetary Activity	
<b>Purpose</b>	Provides the output for the VT PO Budgetary Activity report that is initiated by running a process in the Purchasing module.
<b>Prompts</b>	Process instance
<b>Columns</b>	Process instance, PO business unit, GL business unit, PO ID, PO status, line number, schedule number, distribution line number, dept ID, class, project/grant, fund, account, budget date from, budget date to, program, contract ID, vendor, vendor name, original PO amount, liquidated amount, vouchered amount, remaining amount, PO reference, PO line description, buyer, PO date, accounting date

## **Requisitions**

VT_REQ_ACCOUNT_TYPE_NOT_E – Req's Without Expense Account	
<b>Purpose</b>	Lists all Req's and associated accounting information that has an account other than an expense account
<b>Prompts</b>	GL business unit, range of requisition accounting date
<b>Columns</b>	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	
<b>Purpose</b>	Lists all requisitions for a PO business unit within a stated date range and their current statuses
<b>Prompts</b>	PO business unit, range of requisition accounting date
<b>Columns</b>	PO business unit, req. date, req. ID, origin, status, budget status, post status, req. line number, req. description, amount

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

VTPO006B – Quote groups listed by supplier	
<b>Purpose</b>	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").
<b>Prompts</b>	Set ID (type "STATE"), supplier ID (use % for all), quote group ID (use % for all)
<b>Columns</b>	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	
<b>Purpose</b>	Lists all approved requisitions and corresponding business unit with a "CP" origin and a valid budget check status
<b>Prompts</b>	Range of accounting dates
<b>Columns</b>	PO business unit, req. ID, date, status (always "A"), origin (always "CP")

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

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

VT_PO8002– VT Req Budgetary Activity	
<b>Purpose</b>	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
<b>Prompts</b>	Process instance
<b>Columns</b>	Process instance, PO business unit, GL business unit, requisition ID, requisition status, line number, schedule number, distribution line number, dept ID, class, project/grant, fund, account, budget date from, budget date to, program, vendor ID, original requisition amount, liquidated amount, PO amount, remaining amount, requestor

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

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

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

**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)

Vt Run Pos8001

Run Control ID Run\_VTP08001

Report Manager Process Monitor

Run

Language English

Report Request Parameters

Business Unit GL:

\*Budget Date From:

\*To:

Remaining Amount:


0.000

This report will return data meeting either

PO Status:

of the criteria specified in this box.

ChartField Sort Options

Personalize | Find | View All | 

First 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
ACCOUNT	Account		

Run Query VT\_PO8001 for VTP08001 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 Run\_VTPO8001 [Report Manager](#) [Process Monitor](#) [Run](#)

Language English

**Report Request Parameters**

Business Unit GL:  \*Budget Date From:  \*To:

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

PO Status: = Approved

**ChartField Sort Options** [Personalize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

*ChartField	Short Name	From ChartField Value	To ChartField Value
ACCOUNT	Account		

Run Query VT\_PO8001 for VTPO8001 output

[Save](#) [Add](#) [Update/Display](#)

Click Run button. The Process Scheduler Request page displays:

**Process Scheduler Request** [Help](#)

User ID DBROCHU Run Control ID Run\_VTPO8001

Server Name  Run Date

Recurrence  Run Time  [Reset to Current Date/Time](#)

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	VT Purchasing Budget Activity	VTPO8001	SQR Report	Web	SPF	<a href="#">Distribution</a>

[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:

Process List

Server List

View Process Requests

User ID DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	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

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

\*Search By

Query Name

begins with

VT\_PO8001

Search

Advanced Search

Search Results

\*Folder View

-- All Folders --

Query

1-1 of 1

View All

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to 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**

\*Process Instance

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 Instance	Business Unit	Business Unit GL	PO ID	PO Status	Line	Sched Num	Distrib Line Num	DeptID	Class	Proj/Grt	Fund	Account	Budget Date From	Budget Date To	Program	Contract ID	Vendor
9472976	03440	03440	0000015054	D		2	1	1				603380	7/1/2018	6/30/2019		000000000000000000002920	0000002975
9472976	03440	03440	0000015148	D		1	1	2				600180	7/1/2018	6/30/2019			0000002975
9472976	03440	03440	0000015174	D		1	1	2				603360	7/1/2018	6/30/2019			0000005854

Vendor Name	Original PO Amount	Liquidated Amount	Vouchered Amount	Remaining 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](#)

Find an Existing Value

Run Control ID Run\_POROL001

Add

**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 Order Report

### Open Purchase Order Report

Run Control ID Run\_POROL001
Report Manager Process Monitor
Run

Language English

#### Report Request Parameters

Business Unit 01110
Ledger Group

Supplier ID

#### Budget Date Range

From Date
To Date

Refresh

#### ChartField Selection

Personalize Find
First 1-6 of 6 Last

Sequence	Field Long Name	Include CF
1	Account	<input checked="" type="checkbox"/>
2	Fund Code	<input checked="" type="checkbox"/>
3	Department	<input checked="" type="checkbox"/>
4	Program Code	<input checked="" type="checkbox"/>
5	Class Field	<input checked="" type="checkbox"/>
6	Project	<input checked="" type="checkbox"/>

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 Order Report

Run Control ID Run\_POROL001

Report Manager Process Monitor

Run

Language English

### Report Request Parameters

Business Unit 02140

Ledger Group

Supplier ID 0000041897

### Budget Date Range

From Date 07/01/2022

To Date 06/30/2023

Refresh

### ChartField Selection

Personalize | Find | First 1-6 of 6 Last

Sequence	Field Long Name	Include CF
1	Account	<input checked="" type="checkbox"/>
2	Fund Code	<input checked="" type="checkbox"/>
3	Department	<input checked="" type="checkbox"/>
4	Program Code	<input checked="" type="checkbox"/>
5	Class Field	<input checked="" type="checkbox"/>
6	Project	<input checked="" type="checkbox"/>

Save Notify

Add Update/Display

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

## Process Scheduler Request

User ID DBROCHU

Run Control ID Run\_POROL001

Server Name

Run Date 01/22/2024

Recurrence

Run Time 1:00:05PM

Reset to Current Date/Time

Time Zone

### Process List

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

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 Open Purchase Order Report page displays:

Click the [Process Monitor](#) link

The Process List page displays:

Process List

Server List

View Process Requests

User ID

DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437259		Run_POROL001	SQR Report	POROL001	DBROCHU	01/22/2024 1:00:05PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

Go back to [Open Purchase Order](#)

Save

Notify

Click Refresh until the Run Status displays “Success” and the Distribution Status displays “Posted”

Click on [Report Manager](#) link. Click on the Administration tab

Click on [Open Purchase Order](#) link

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

5

Days

Refresh

Status

Folder

Instance

to

Report List

1-30 of 30

View All

Select	Report ID	Prco Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514134	12437259	<a href="#">Open Purchase Order</a>	01/22/2024 1:02:14PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Report ID : POROL001 Operator ID : SSMITH2 Run Control : Run_Open_PO_Rpt Budget Date : 07/01/2018 To:06/30/2020	PeopleSoft Purchasing  <b>OPEN PURCHASE ORDER REPORT - OPEN PO LOOKUP</b>	Page : 1 Run Date 01/18/2019 Run Time 09:09:11
--	---	--

<u>PO BU</u>	<u>Purchase Order</u>	<u>Line/Sch/Dist</u>	<u>Orig Qty</u>	<u>Qty Remain</u>	<u>Orig Encumb</u>	<u>Encumb Remain</u>	<u>Currency</u>	<u>Orig Encumb Base</u>	<u>Encumb Remain Base</u>	<u>Base Currency</u>	<u>Item Description</u>
02140	0000041146	DATE: 08/29/2018			Supplier: 0000041897	NAME: MEDICALSER-001			BUYER: Jordan Black-Deegan		
	1	1	1		1.00	0.00	6,090.00	0.00 USD	6,090.00	0.00 USD	Blood Toxicology Testing & Service
<u>Distrib Type</u>	<u>GL BU</u>	<u>Account</u>	<u>Fund</u>	<u>Department</u>	<u>Program</u>	<u>Class</u>	<u>Project</u>				
Expense	02140	507600	21500	2140091000			NH18405D-027				
<u>Ledger Group</u>	<u>GL BU</u>	<u>Account</u>	<u>Fund</u>	<u>Department</u>	<u>Program</u>	<u>Class</u>	<u>Project</u>				
PRMST_EXP	02140						NH18405D-027				
											PO TOTAL
											6,090.00
0000041437	DATE: 10/03/2018				Supplier: 0000041897	NAME: MEDICALSER-001			BUYER: Angelo Thomas Filippone		
	1	1	1		1.00	0.00	9,130.00	0.00 USD	9,130.00	0.00 USD	Blood Toxicology Testing & Service
<u>Distrib Type</u>	<u>GL BU</u>	<u>Account</u>	<u>Fund</u>	<u>Department</u>	<u>Program</u>	<u>Class</u>	<u>Project</u>				
Expense	02140	519170	21500	2140091000			NH18405D-027				
<u>Ledger Group</u>	<u>GL BU</u>	<u>Account</u>	<u>Fund</u>	<u>Department</u>	<u>Program</u>	<u>Class</u>	<u>Project</u>				
PRMST_EXP	02140						NH18405D-027				
											PO TOTAL
											9,130.00
0000041514	DATE: 10/11/2018				Supplier: 0000041897	NAME: MEDICALSER-001			BUYER: Angelo Thomas Filippone		

## 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

The screenshot shows the 'Expediting Report' interface with the 'Add a New Value' tab selected. It features a search bar with the text 'Run\_POX4006' and an 'Add' button. A 'Find an Existing Value' button is also visible in the top right corner.

### 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:

The screenshot displays the main 'Expediting' report page. At the top, it shows the 'Run Control ID' as 'Run\_POX4006' and the 'Language' set to 'English'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this is a section titled 'Report Request Parameters' containing input fields for 'From Date', 'Through Date', 'Supplier SetID', 'Supplier ID', and 'Buyer', each with a search icon. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and '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

Language English

**Report Request Parameters**

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

User ID DBROCHU Run Control ID Run\_POX4006

Server Name Run Date 01/22/2024

Recurrence Run Time 1:51:47PM Reset to Current Date/Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Expediting Report by Buyer	POX4006	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Supplier	POX4007	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Due Date	POX4008	BI Publisher	Web	PDF	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 [Process Monitor](#) link

The Process List page displays:

Process List

Server List

View Process Requests

User ID

DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-3 of 3

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437262		Run_POX4006	BI Publisher	POX4008	DBROCHU	01/22/2024 1:48:28PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437261		Run_POX4006	BI Publisher	POX4007	DBROCHU	01/22/2024 1:48:28PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437260		Run_POX4006	BI Publisher	POX4006	DBROCHU	01/22/2024 1:48:28PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

Go back to Expediting Report

Save

Notify

Click Refresh until the Run Status displays “Success” and the Distribution Status displays “Posted”

Click on the Administration tab

Click on [POX4006 – POX4006.pdf](#) link

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

5

Days

Refresh

Status

Folder

Instance

to


Report List

1-33 of 33

View All

Select	Report ID	Pracs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514140	12437260	POX4006 - POX4006.pdf	01/22/2024 1:51:40PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514139	12437261	POX4007 - POX4007.pdf	01/22/2024 1:51:40PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514138	12437262	POX4008 - POX4008.pdf	01/22/2024 1:51:38PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

### Example of Report Output

	Report ID: POX4006 User ID: SSMITH2 Run Control: Run_Expediting_Reports	PeopleSoft Purchasing <b>EXPEDITING REPORT BY BUYER</b>	Page No. 1 Run Date 1/18/2019 Run Time 9:33:43 AM
---	---	--	---

Due Dates Included : 07/01/2018 Thru: 06/30/2020  
 Buyer: Angelo Thomas Filippone

Due Date	Days Late	BU	PO ID	Contract ID	Rel	Supplier ID	Supplier Name	Item ID	Item Description	Line	Schd	Ord Qty	UOM	Shipto ID
10/03/2018	107	02140	0000041437	00000000000000000000033153	21	0000041897	National Medical Services Inc		Blood Toxicology Testing & Services	1	1	1	EA	PDPSTWB001
10/11/2018	99	02140	0000041514	00000000000000000000033153	22	0000041897	National Medical Services Inc		Blood Toxicology Testing & Services	1	1	1	EA	PDPSTWB001
10/16/2018	94	02140	0000041540	00000000000000000000033153	23	0000041897	National Medical Services Inc		Blood Toxicology Testing & Services	1	1	1	EA	PDPSTWB001

## 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](#)

Find an Existing Value

\*Run Control ID Run\_POX4007

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\_POX4007)

**Click the Add Button**

**The Expediting page displays:**

**Expediting**

Run Control ID Run\_POX4007      Report Manager   Process Monitor   **Run**

Language English ▾

**Report Request Parameters**

From Date  31      Through Date  31

Supplier SetID  🔍

Supplier ID  🔍

Buyer  🔍

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 31      Through Date 06/30/2023 31

Supplier SetID STATE 🔍

Supplier ID 0000041897 🔍

Buyer  🔍

Save   Notify      Add   Update/Display

**Click Run button**

The Process Scheduler Request page displays:

Process Scheduler Request

User ID DBROCHU Run Control ID Run\_POX4006

Server Name  Run Date 01/22/2024

Recurrence  Run Time 1:51:47PM

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Expediting Report by Buyer	POX4006	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Expediting Report by Supplier	POX4007	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Due Date	POX4008	BI Publisher	Web	PDF	Distribution

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:

Process List Server List

**View Process Requests**

User ID DBROCHU  Type  Last  20 Minutes

Server  Name  Instance 12437261 Range

Run Status  Distribution Status  ☒ Save On Refresh Report Manager

**Process List**

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437261		Run_POX4006	BI Publisher	POX4007	DBROCHU	01/22/2024 1:48:28PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

Click Refresh until the Run Status displays “Success” and the Distribution Status displays “Posted”

Click on [Report Manager](#) link.

Click on the Administration tab

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

5

Days

Refresh

Status

Folder

Instance

12437261

to

12437261

Report List

<<

<

1-1 of 1

>

>>

View All

Select	Report ID	Prco Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514139	12437261	POX4007 - POX4007.pdf	01/22/2024 1:51:40PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

☒ Select All

☐ Deselect All

Delete

Click the delete button to delete the selected report(s)

[Go back to Process Requests](#)

Click on [POX4007 – POX4007.pdf](#) link

### Example of Report Output

ORACLE

Report ID: POX4007

User ID: SSMITH2

Run Control: Run\_Expediting\_Reports

PeopleSoft Purchasing

EXPEDITING REPORT BY SUPPLIER

Page No. 1

Run Date 1/18/2019

Run Time 9:44:00 AM

Due Dates Included : 07/01/2018 Thru: 06/30/2020

Supplier ID : 0000041897 National Medical Services Inc

Due Date	Days Late	BU	PO ID	Contract ID	Rel	Buyer	Item ID	Item Description	Line	Schd	Ord Qty	UOM	Shipto ID
08/09/2018	162	03420	0000061924	0000000000000000000026389	67	Lisa E Hill		Provide toxicological analysis of postmortem specimens with screening and confirmation, storage of specimens, and proper chain of custody protocol.	1	1	1	EA	PHEABRL003
08/22/2018	149	03420	0000062032	0000000000000000000026389	68	Lisa E Hill		Provide toxicological analysis of postmortem specimens with screening and confirmation, storage of specimens, and proper chain of custody protocol.	1	1	1	EA	PHEABRL003
08/29/2018	142	02140	0000041146	0000000000000000000033153	20	Jordan Black-Deegan		Blood Toxicology Testing & Services	1	1	1	EA	PDPSWTB001

## 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](#)[Find an Existing Value](#)

\*Run Control ID

Run\_POX4008

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\_POX4008)

Click the Add Button

The Expediting page displays:

**Expediting**

Run Control ID Run\_POX4008

Report Manager Process Monitor Run

Language English

**Report Request Parameters**

From Date

Through Date

Supplier SetID

Supplier ID

Buyer

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

**Report Request Parameters**

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

User ID DBROCHU      Run Control ID Run\_POX4006

Server Name      Run Date 01/22/2024

Recurrence      Run Time 1:51:47PM      Reset to Current Date/Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Expediting Report by Buyer	POX4006	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Expediting Report by Supplier	POX4007	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Expediting Report by Due Date	POX4008	BI Publisher	Web	PDF	Distribution

OK Cancel

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 [Process Monitor](#) link



## The Process List page displays:

Process List

Server List

View Process Request For

User ID

SSMITH2

Type

Last

1

Days

Refresh

Server

Name

Instance From

Instance To

Run Status

Distribution Status

Save On Refresh

Process List

Personalize | Find | View All |

First

1-8 of 8

Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	9473239		BI Publisher	POX4007	SSMITH2	01/18/2019 9:43:24AM EST	Success	Posted	Details

Click Refresh until the Run Status displays “Success” and the Distribution Status displays “Posted”

Click on [Report Manager](#) link

## The View Reports For page displays:

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

5

Days

Refresh

Status

Folder

Instance

12437262

to

12437262

Report List

1-1 of 1

View All

Select	Report ID	Prcls Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514138	12437262	POX4008 - POX4008.pdf	01/22/2024 1:51:38PM	Acrobat (*.pdf)	Posted	Details

☒ Select All

☐ Deselect All

Delete

Click the delete button to delete the selected report(s)


Go back to Process Requests

Save

Click on the Administration tab

Click on [POX4008 – POX4008.pdf](#) link

### Example of Report Output

	Report ID: User ID: Run Control:	POX4008 SSMITH2 Run_Expediting_Reports	PeopleSoft Purchasing <b>EXPEDITING REPORT BY DUE DATE</b>										Page No. 1 Run Date 1/18/2019 Run Time 9:37:29 AM
Due Dates Included : 07/01/2018 Thru: 06/30/2020 Due Date : 08/09/2018 Days Late : 162													
BU	PO ID	Contract ID	Rel	Buyer	Supplier ID	Supplier Name	Item ID	Item Description	Line	Sch	Ord Qty	UOM	Shipto ID
03420	0000061924	0000000000000000000000000026389	67	Lisa E Hill	0000041897	National Medical Services Inc		Provide toxicological analysis of postmortem specimens with screening and confirmation, storage of specimens, and proper chain of custody protocol.	1	1	1	EA	PHEABR 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](#)[Find an Existing Value](#)

\*Run Control ID Run\_VT\_RPTPO011

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\_VT\_RPTPO011)

**Click the Add Button**

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

**Item Categories by Buyer**

Run Control ID Run\_VT\_RPTPO011

Report Manager Process Monitor Run

Language English

**Report Request Parameters**

\*SetID: STATE

Primary Buyer (% for All):

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\_RPTPO011      Report Manager Process Monitor Run

Language English

**Report Request Parameters**

\*SetID: STATE

Primary Buyer (% for All): %

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\_VT\_RPTPO011

Server Name      Run Date 01/23/2024

Recurrence      Run Time 7:53:21AM      Reset to Current Date/Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	VT_RPTPO011	VT_RPTPO011	Application Engine	Web	PDF	Distribution

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\_RPTPO011

Report Manager

Process Monitor

Run

Language

English

Process Instance:12437272

Report Request Parameters

\*SetID:

STATE

Primary Buyer (% for All):

%

Save

Notify

Add

Update/Display

Click the [Process Monitor](#) link

The Process List page displays:

Process List

Server List

View Process Requests

User ID

DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437272		Run_VT_RPTPO011	Application Engine	VT_RPTPO011	DBROCHU	01/23/2024 7:53:21AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For

User ID

DBROCHU

Type

Last

5

Days

Refresh

Status

Folder

Instance

to

Report List


1-35 of 35

View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514150	12437272	VT_RPTPO011 - VT Item Categories by Buyer.pdf	01/23/2024 7:56:07AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [VT RPTPO011 – VT Item Categories by Buyer.pdf](#) link

### Example of Report Output

		State of Vermont Item Categories by Buyer		Report Definition: VTRPTPO011 Page: 1 of 24 Run Date: 1/23/2024 Run Time: 07:56:06 AM	
Primary Buyer	Category CD	Category Description	Lead Time Days	Account	Account Description
	00200	Grants	0	550220	Grants
	BDA	Blanket Delegation of Authorit	0	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	0	135001	Materials for Resale
	BGS72	BGS Fed. Surplus Property	0	135001	Materials for Resale
	BGS73	BGS State Surplus Property	0	135001	Materials for Resale
	BGSDS	BGS-Central Stores Direct Ship	0	525310	Cost of Direct Ship Items Sold
	BGSFC	BGS Forms - Court	0	135001	Materials for Resale
	BGSFP	BGS Forms - Path	0	135001	Materials for Resale
	BGSIN	BGS Inventory	0	137001	Inventory Clearing Account
	BGSSP	BGS Special Order	0	135001	Materials for Resale
	BGSTB	BGS Telephone Books	0	135001	Materials for Resale
	DIG	Digital Printing	0	517000	Printing and Binding
	FIN	Finish	0	517000	Printing and Binding
	LEG	Legislative	0	517000	Printing and Binding
	MIS	Miscellaneous	0	517000	Printing and Binding
	MISCE	Miscellaneous Expense	0	520500	Other General Supplies
DLAROSE	04566	REFRIGERATORS AND FREEZERS	30	522400	Other Equipment
DLAROSE	04578	VACUUM CLEANERS, ELECTRIC	30	522400	Other Equipment
DLAROSE	04592	WASHERS AND DRYERS, COMMERCIAL	30	522400	Other Equipment
DLAROSE	08010	BADGES, BUTTONS, EMBLEMS	30	520500	Other General Supplies
DLAROSE	08015	PATCHES, CLOTH, CAPS, SHOULDER	30	520520	Cloth & Clothing
DLAROSE	16502	BLENDERS, MIXERS, ETC.	30	522400	Other Equipment
DLAROSE	16505	CABINETS,COUNTERS,TABLES, ETC.	30	522400	Other Equipment
DLAROSE	16515	COFFEEMAKERS, URNS/BAGS/ETC.	30	522400	Other Equipment
DLAROSE	16529	DISHWASHERS, COMMERCIAL TYPE	30	522400	Other Equipment
DLAROSE	16531	DISPENSERS, ALL TYPES	30	522400	Other Equipment
DLAROSE	16544	FOOD CONTAINERS,SS/VACUUM TYPE	30	522400	Other Equipment
DLAROSE	16547	FOOD CARTS/CAFETERIA SERVING	30	522400	Other Equipment
DLAROSE	16552	ICE EQUIPMENT: CRUSHERS,ETC.	30	522400	Other Equipment
DLAROSE	16560	OVENS,CONVECTION & MICROWAVES	30	522400	Other Equipment
DLAROSE	16568	RACKS: CUP, GLASS, TRAY, ETC.	30	522400	Other Equipment
DLAROSE	16573	RANGES,GRIDDLES, ETC.	30	522400	Other Equipment
DLAROSE	16579	SINKS, SCULLERY, GALV. & SS	30	522400	Other Equipment
DLAROSE	16585	STEAM COOKERS/STM JKTD KETTLES	30	522400	Other Equipment
DLAROSE	16599	KITCHEN EQUIP. NOT CLASSIFIED	30	522400	Other Equipment
DLAROSE	17508	BALANCES & ACCESS. LAB	30	522400	Other Equipment
DLAROSE	17511	CELLS & CUVETTES - PHOTO SPEC.	30	521810	Medical and Lab Supplies
DLAROSE	17514	CHROMATOGRAPH & SPECTROMETER	30	521810	Medical and Lab Supplies
DLAROSE	17528	ELECTROPHORESIS SUPPLIES: GEL,	30	521810	Medical and Lab Supplies
DLAROSE	17529	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](#)[Find an Existing Value](#)

\*Run Control ID Run\_POX4021

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\_POX4021)

Click the Add Button

The Status Listings page displays:

**Status Listings**

Run Control ID Run\_POX4021

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 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\_POX4021Report Manager Process MonitorRun

Language English

Report Request Parameters

From Date07/01/2023

Through Date12/31/2023

Business Unit01110

Save

Notify

Add

Update/Display

**Click Run button**

**The Process Scheduler Request page displays:**

### Process Scheduler Request

User ID DBROCHURun Control ID Run\_POX4021

Server Name

Run Date01/23/2024

Recurrence

Run Time8:20:13AM

Time Zone

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Order Status By Vendor	POX4020	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	Order Status By Item	POX4021	BI Publisher	Web	PDF	Distribution

OKCancel

**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

Report Manager Process Monitor Run

Language English

Process Instance:12437273

#### Report Request Parameters

From Date 07/01/2023

Through Date 12/31/2023

Business Unit 01110

Save Notify Add Update/Display

Click the [Process Monitor](#) link

The Process List page displays:

Process List Server List

#### View Process Requests

User ID DBROCHU

Type

Last

20 Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

☒ Save On Refresh

Report Manager

Reset

Process List

< < 1-1 of 1 > > | View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437273		Run_POX4021	BI Publisher	POX4021	DBROCHU	01/23/2024 8:20:13AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

Click Refresh until the Run Status displays “Success” and the Distribution Status displays “Posted”

Click on [Report Manager](#) link

Click on the Administration tab

List Explorer **Administration** Archives

#### View Reports For

User ID DBROCHU

Type

Last

5 Days

Refresh

Status

Folder

Instance  to

Report List

< < 1-36 of 36 > > | View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514152	12437273	<a href="#">POX4021 - POX4021.pdf</a>	01/23/2024 8:21:24AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

	Report ID:	POX4021	PeopleSoft Purchasing	Page No.	1
	User ID:	DBROCHU		Run Date	1/23/2024
	Run Control:	Run_POX4021		Run Time	5:21:24 AM

**ORDER STATUS BY ITEM**

## 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](#)[Find an Existing Value](#)

\*Run Control ID Run\_POX4020

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\_POX4020)

Click the Add Button

The Status Listings page displays:

**Status Listings**

Run Control ID Run\_POX4020Report ManagerProcess MonitorRun

LanguageEnglish

**Report Request Parameters**

From DateThrough Date

Business Unit

SaveNotify

AddUpdate/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 31 Through Date 12/31/2023 31

Business Unit 01110 🔍

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\_POX4020

Server Name ▼ Run Date 01/23/2024 31

Recurrence ▼ Run Time 8:52:45AM Reset to Current Date/Time

Time Zone 🔍

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Order Status By Vendor	POX4020	BI Publisher	<span>Web</span> <span>▼</span>	<span>PDF</span> <span>▼</span>	<span>Distribution</span>
<input type="checkbox"/>	Order Status By Item	POX4021	BI Publisher	<span>Web</span> <span>▼</span>	<span>PDF</span> <span>▼</span>	<span>Distribution</span>

OK Cancel

**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 Notify

Add Update/Display

Click the [Process Monitor](#) link

The Process List page displays:

Process List Server List

View Process Requests

User ID DBROCHU

Type

Last

20 Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

☒ Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437274		Run_POX4020	BI Publisher	POX4020	DBROCHU	01/23/2024 8:52:45AM EST	Success	Posted	<a href="#">Details</a>	<span>Actions</span>

Click Refresh until the Run Status displays “Success” and the Distribution Status displays “Posted”

Click on [Report Manager](#) link

Click on the Administration tab

List Explorer Administration Archives

View Reports For

User ID DBROCHU

Type

Last

5 Days

Refresh

Status

Folder

Instance

to

Report List

1-37 of 37

View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514154	12437274	<a href="#">POX4020 - POX4020.pdf</a>	01/23/2024 8:54:10AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [POX4020 – POX4020.pdf](#) link

Example of Report Output

ORACLE		Report ID: POX4020	PeopleSoft Purchasing					Page No. 1					
		User ID: DBROCHU	ORDER STATUS BY SUPPLIER					Run Date 1/23/2024					
		Run Control: Run_POX4020						Run Time 5:54:10 AM					
Due Dates Included: 7/1/2023 Thru: 12/31/2023													
Business Unit: 01110													
Contract ID													
		Item ID	Item Description	Line	Schd	Order Qty	UOM	Curr	Order Amt	Due Date	Shipto ID		
Supplier ID: 0000000008		Name: Deerfield Valley News											
PO ID: 0000001065		Date: 12/27/2023	PO Status: Open	Buyer: Jamie A Sheltra									
00000000000000000000000046464				Test PPM UOM	1	1	1.00	PPM	USD	1.00	12/27/2023	PFMMTP002	
00000000000000000000000046464				Test CYB UOM	2	1	1.00	CYB	USD	1.00	12/27/2023	PFMMTP002	
Supplier ID: 0000344287		Name: NWN Corporation											
PO ID: 0000001063		Date: 7/11/2023	PO Status: Dispatched	Buyer: Alicia R Hill									
00000000000000000000000042577				Statewide Voice over IP Services	1	1	1.00	EA	USD	20.72	7/11/2023	PADMMTP001	
Supplier ID: 0000380534		Name: Ivalua Inc.											
PO ID: 0000001064		Date: 7/26/2023	PO Status: Dispatched	Buyer: Alicia R Hill									
00000000000000000000000039128				ePro SaaS	1	1	1.00	EA	USD	962.50	7/26/2023	PADMMTP001	

## 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](#)[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:

**Detail Listings**

Run Control ID Run\_PO\_Detail\_Listing

Report Manager Process Monitor Run

Language English

**Report Request Parameters**

From Date Through Date

Business Unit

Supplier SetID

Supplier ID

Buyer

Save Notify

Add Update/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 Scheduler Request**

User ID DBROCHU      Run Control ID PO\_Detail\_Listing

Server Name      Run Date 01/23/2024

Recurrence      Run Time 9:12:40AM      Reset to Current Date/Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Detail Listing By PO Date	POX4030	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Detail Listing By Supplier	POX4031	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Detail Listing By Buyer	POX4032	BI Publisher	Web	PDF	Distribution

OK      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

Buyer

Save Notify

Add Update/Display

Click the [Process Monitor](#) link

The Process List page displays:

Process List Server List

View Process Requests

User ID DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager


Reset

Process List

1-3 of 3

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437277		PO_Detail_Listing	BI Publisher	POX4032	DBROCHU	01/23/2024 9:12:40AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437276		PO_Detail_Listing	BI Publisher	POX4031	DBROCHU	01/23/2024 9:12:40AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437275		PO_Detail_Listing	BI Publisher	POX4030	DBROCHU	01/23/2024 9:12:40AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

	<b>Report ID:</b> <b>User ID:</b> <b>Run Control:</b>	<b>POX4030</b> <b>DBROCHU</b> <b>PO_Detail_Listing</b>	<b>PeopleSoft Purchasing</b> <b>PO DETAIL LISTING BY PO DATE</b>				<b>Page No. 1</b> <b>Run Date 1/23/2024</b> <b>Run Time 9:13:57 AM</b>	
---	---	--	---	--	--	--	--	--



## 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

The screenshot shows the 'PO Listings' tab with a sub-tab 'Add a New Value'. On the right, there is a button 'Find an Existing Value'. Below, there is a text input field labeled '\*Run Control ID' containing the text 'Run\_PO\_Listing'. Below this field is an 'Add' button.

### 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:

The screenshot shows the 'Listings' page. At the top, there is a 'Run Control ID' field with the value 'Run\_PO\_Listing' and a 'Language' dropdown menu set to 'English'. To the right are links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below this is a section titled 'Report Request Parameters' containing several input fields: 'Business Unit', 'From Date', 'Through Date', 'Supplier SetID', 'Supplier ID', 'Buyer', and 'PO Status' (a dropdown menu). At the bottom of the page are buttons for 'Save', 'Notify', 'Add', and '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:12437278,12437279,12437280,12437281

#### Report Request Parameters

Business Unit02170

From Date07/01/2019

Through Date12/31/2023

Supplier SetIDSTATE

Supplier ID0000041897

Buyer

PO StatusDispatched

Save

Notify

Add

Update/Display

Click Run button.

### The Process Scheduler Request page displays:

### Process Scheduler Request

User ID DBROCHU

Run Control ID Run\_PO\_Listing

Server Name

Run Date01/23/2024

Recurrence

Run Time10:41:05AM

Time Zone

Reset to Current Date/Time

#### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Listing by PO Date	POX4010	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Listing by Vendor	POX4011	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Listing by Buyer	POX4012	BI Publisher	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Listing By Status	POX4013	BI Publisher	Web	PDF	Distribution

OK

Cancel

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

- **Select** – Choose one or ALL desired report(s) (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:

**Process List** [Server List](#)

**View Process Requests**

User ID   Type  Last  20 Minutes   
Server  Name   Instance  Range   
Run Status  Distribution Status  ☒ Save On Refresh Report Manager

**Process List**

< 1-4 of 4 > | View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437281		Run_PO_Listing	BI Publisher	POX4013	DBROCHU	01/23/2024 10:41:05AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437280		Run_PO_Listing	BI Publisher	POX4012	DBROCHU	01/23/2024 10:41:05AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437279		Run_PO_Listing	BI Publisher	POX4011	DBROCHU	01/23/2024 10:41:05AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437278		Run_PO_Listing	BI Publisher	POX4010	DBROCHU	01/23/2024 10:41:05AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For**

User ID   Type  Last  5 Days   
Status  Folder  Instance  to

**Report List**

< 1-38 of 38 > | View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514168	12437279	<a href="#">POX4011 - POX4011.pdf</a>	01/23/2024 10:42:07AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514167	12437280	<a href="#">POX4012 - POX4012.pdf</a>	01/23/2024 10:42:02AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514166	12437281	<a href="#">POX4013 - POX4013.pdf</a>	01/23/2024 10:42:01AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514165	12437278	<a href="#">POX4010 - POX4010.pdf</a>	01/23/2024 10:42:01AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [POX401X – POX401X.pdf](#) link

**Example of Report Output(s):**  
**PO Listing by Date**

<b>ORACLE</b>	Report ID: User ID: Run Control:	POX4010 <b>SSMITHZ</b> Run_PO_Listing	<b>PeopleSoft Purchasing PO LISTING BY PO DATE</b>	Page No. Run Date Run Time	1 1/18/2019 10:44:56 AM
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PO Dates Included :    07/01/2018      Thru:    06/30/2019  
Business Unit:     02140

PO Date	PO ID	Contract ID	Rel	Change Order	Buyer	Supplier Id	Name	PO Status	Hold	Rcv	Curr	Amount
08/29/2018	0000041146	0000000000000000000000033153	20	0	Jordan Black-Deegan	0000041897	National Medical Services Inc	Dispatched	N	N	USD	6,090.00
10/03/2018	0000041437	0000000000000000000000033153	21	0	Angelo Thomas Filippone	0000041897	National Medical Services Inc	Dispatched	N	N	USD	9,130.00
10/11/2018	0000041514	0000000000000000000000033153	22	0	Angelo Thomas Filippone	0000041897	National Medical Services Inc	Dispatched	N	N	USD	514.00
10/16/2018	0000041540	0000000000000000000000033153	23	0	Angelo Thomas Filippone	0000041897	National Medical Services Inc	Dispatched	N	N	USD	7,812.00

## PO Listing by Supplier

[illegible]

## PO Listing by Buyer



Report ID: POX4012

User ID: SSMITH2

Run Control: Run\_PO\_Listing

PeopleSoft Purchasing

PO LISTING BY BUYER

Page No. 1

Run Date 1/18/2019

Run Time 10:40:58 AM

PO Dates Included : 7/1/2018

Thru: 6/30/2019

Buyer: Angelo Thomas Philippine

BU	PO ID	Contract ID	Rel	Change	PO Date	Supplier ID	Name	PO Status	Hold	Rcv	Curr	Amount
				Order								
02140	0000041437	000000000000000000000000033153	21	0	10/3/2018	0000041897	National Medical Services Inc	Dispatched	N	N	USD	9,130.00
02140	0000041514	000000000000000000000000033153	22	0	10/11/2018	0000041897	National Medical Services Inc	Dispatched	N	N	USD	514.00
02140	0000041540	000000000000000000000000033153	23	0	10/16/2018	0000041897	National Medical Services Inc	Dispatched	N	N	USD	7,812.00

### PO Listing by PO Status

ORACLE®

Report ID:  
User ID:  
Run Control:

POX4013  
SSMITHZ  
Run\_PO\_Listing

PeopleSoft Purchasing  
PO LISTING BY STATUS

Page No.  
Run Date  
Run Time

1  
1/18/2019  
10:49:12 AM

PO Dates Included : 7/1/2018 Thru: 6/30/2019

PO Status: Dispatched

BU	PO ID	Contract ID	Rel	Change Order	PO Date	Supplier ID	Name	Buyer	Hold	Rcv	Ord Qty
02140	0000041146	000000000000000000000033153	20	0	8/29/2018	0000041897	National Medical Services Inc	Jordan Black-Deegan	N	N	1.00
02140	0000041437	000000000000000000000033153	21	0	10/3/2018	0000041897	National Medical Services Inc	Angelo Thomas Filippone	N	N	1.00
02140	0000041514	000000000000000000000033153	22	0	10/11/2018	0000041897	National Medical Services Inc	Angelo Thomas Filippone	N	N	1.00
02140	0000041540	000000000000000000000033153	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](#)[Find an Existing Value](#)

\*Run Control ID

Run\_POX4100

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\_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

31

Through Date

31

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  [31](#) Through Date  [31](#)

Business Unit  [Q](#)

[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\_POX4100

Server Name  Run Date  [31](#)

Recurrence  Run Time  [Reset to Current Date/Time](#)

Time Zone  [Q](#)

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO to Requisition XREF Report	POX4100	BI Publisher	<span>Web</span>	<span>PDF</span>	Distribution

[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 Requisition/PO Xfer page displays:

### Requisition/PO Xref

Run Control ID Run\_POX4100

Report Manager Process Monitor Run

Language English

Process Instance:12437283

Report Request Parameters

From Date 07/01/2023

Through Date 12/31/2023

Business Unit 01110

Save Notify

Add Update/Display

Click the [Process Monitor](#) link

The Process List page displays:

Process List Server List

View Process Requests

User ID DBROCHU

Type  Last  20 Minutes  Refresh

Server  Name  Instance  Range  Clear

Run Status  Distribution Status  ☒ Save On Refresh Report Manager Reset

Process List

1-1 of 1 View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437283		Run_POX4100	BI Publisher	POX4100	DBROCHU	01/23/2024 11:20:52AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For

User ID DBROCHU

Type  Last  5 Days  Refresh

Status  Folder  Instance  to

Report List

1-39 of 39 View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514171	12437283	POX4100 - POX4100.pdf	01/23/2024 11:22:07AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [POX4100 – POX4100.pdf](#) link

## Example of Report Output

ORACLE		Report ID: POX4100 User ID: DSHEPARD Run Control: Run_PO_Requisition_Xfer	PeopleSoft Purchasing PO TO REQUISITION XREF REPORT				Page No. 1 Run Date 1/10/2019 Run Time 12:43:18 PM										
PO Dates Included: 07/01/2018		Thru: 12/31/2018															
Business Unit: 01110																	
Contract ID	Rel	Supplier ID	Lin	Sch	Dst	Item ID	Description	Order Qty	UOM	Cur	Price	Requisition				Quantity	UOM
												ID	Lin	Sch	Dst		
PO_ID: 0000000950		PO Date: 11/21/2018															
		0000005932	1	1	1		Lasermate 20 Offline - Base w/Nester Serial #379	2	EA	USD	50	0000000014	1	1	1	2	EA

## 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](#)[Find an Existing Value](#)

\*Run Control ID

Dispatch\_POs

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\_POXMLP)

Click the Add Button

The Dispatch POs page displays:

**Dispatch POs**

Run Control ID Dispatch\_POs

Language English

Report Manager Process Monitor Run

Specified Language Recipient's Language

**Process Request Parameters**

Business Unit

To

PO ID

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Fax Cover Page

Template ID

**Statuses to Include**

Approved

Dispatched

Pending Cancel

**Dispatch Methods to Include**

Print

FAX

EDX

E-Mail

Phone

**Miscellaneous Options**

\*Chartfields Valid Chartfields

Change Orders Changed and UnChanged Orders

Print Changes Only

Print BU Comments

Test Dispatch

Print PO Item Description

Print Copy

Print Duplicate

Sort By Sort by Line Number

Save 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 select; 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  
Language English

☒ Specified Language ☐ Recipient's Language

**Process Request Parameters**

Business Unit 02140   
To   
PO ID 0000051108   
PO Status Dispatched  
Contract SetID   
Contract ID   
Release   
From Date   
Through Date   
Supplier ID   
Buyer   
Fax Cover Page   
Template ID PO\_DISPATCH\_1

**Statuses to Include**

☐ Approved ☐ Dispatched ☐ Pending Cancel

**Dispatch Methods to Include**

☒ Print ☒ FAX ☒ EDX  
☒ E-Mail ☒ Phone

**Miscellaneous Options**

\*Chartfields Valid Chartfields   
Change Orders Changed and UnChanged Orders   
☐ Print Changes Only ☐ Print BU Comments  
☐ Test Dispatch ☒ Print PO Item Description  
☐ Print Copy ☐ Print Duplicate  
Sort By Sort by Line Number

Click Save button

Click Run button

The Process Scheduler Request page displays:

**Process Scheduler Request**

User ID DBROCHU Run Control ID Dispatch\_POs

Server Name  Run Date 01/23/2024   
Recurrence  Run Time 11:44:50AM   
Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO BI Publisher Dispatch	POXMLP	PSJob	(None) <input type="button" value="Search"/>	(None) <input type="button" value="Search"/>	Distribution
<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Web <input type="button" value="Search"/>	TXT <input type="button" value="Search"/>	Distribution

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

Dispatch\_POs

Language

English

Report Manager

Process Monitor

Run

☒ Specified Language

☐ Recipient's Language

Process Instance:12437284

Click the [Process Monitor](#) link

The Process List page displays:

Process List

Server List

View Process Requests

User ID

DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

☒ Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437284		Dispatch_POs	PSJob	POXMLP	DBROCHU	01/23/2024 11:44:50AM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

Click on [Report Manager](#) link, then Click on the Administration tab

Report Manager

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

15

Minutes

Refresh

Status

Folder

Instance

to

Report List

1-1 of 1

View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514173	12437285	PO_DISPATCH - PO_DISPATCH.pdf	01/23/2024 11:47:38AM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [PO\\_DISPATCH – PO\\_DISPATCH.pdf](#) link

## Example of Report Output



**State of Vermont**  
Department of Public Safety  
45 State Drive

PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, DELIVERY MEMORANDA, BILLS OF LADING, PACKAGES AND CORRESPONDENCE.			
Purchase Order	Date	Revision	Page
02140-0000051108	09-06-2022		1
Payment Terms	Freight Terms	PO Status	Currency
	Destination	Dispatched	USD
Buyer	Phone		
Katie R Irish			

**Supplier:** 0000399995  
McGee Ford of Montpelier  
265 River Street  
Montpelier VT 05602  
United States

**Ship To:** DPS - Fleet Services  
394 Hegeman Ave  
Colchester VT 05446  
United States

**Bill To:** Department of Public Safety  
45 State Drive  
Waterbury VT 05671  
United States

Line-Sch	Description	Quantity	UOM	Unit Price	Extended Amt	Due Date
1 - 1	Off the Lot/Multi-Year Vehicles Other than Current Model Year:	1.00	EA	42,670.26	42,670.26	01/04/2023

Contract ID: 0000000000000000000042688

Contract Line: 49

Item Total 42,670.26

Total PO Amount 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

**PO Schedule Listings**

Add a New Value Find an Existing Value

\*Run Control ID  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\_POX404X)

Click the Add Button

The Schedule Listings page displays:

**Schedule Listings**

Run Control ID Run\_Schedule\_Listings Report Manager Process Monitor Run

Language English ▼

**Report Request Parameters**

From Date  31 Through Date  31

Business Unit  🔍

Supplier SetID  🔍

Supplier ID  🔍

Buyer  🔍

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

Run Control ID Run\_Schedule\_Listings
Report Manager Process Monitor Run

Language English

#### Report Request Parameters

From Date 07/01/2022 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 Scheduler Request

User ID ETEST Run Control ID Run\_PO\_Schedule\_Listings

Server Name Run Date 01/17/2019

Recurrence Run Time 9:17:05AM Reset to Current Date/Time

Time Zone

#### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Schedule Listing by PO Date	POX4040	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Schedule Listing by Supplier	POX4041	BI Publisher	Web	PDF	Distribution
<input type="checkbox"/>	Schedule Listing by Buyer	POX4042	BI 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

Process Instance:12437286,12437287,12437288

Click the [Process Monitor](#) link

The Process List page displays:

Process List Server List

View Process Requests

User ID DBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-3 of 3

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437288		Run_Schedule_Listings	BI Publisher	POX4042	DBROCHU	01/23/2024 12:52:51PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437287		Run_Schedule_Listings	BI Publisher	POX4041	DBROCHU	01/23/2024 12:52:51PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>
<input type="checkbox"/>	12437286		Run_Schedule_Listings	BI Publisher	POX4040	DBROCHU	01/23/2024 12:52:51PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For

User ID DBROCHU

Type

Last

5

Minutes

Refresh

Status

Folder

Instance

to

Report List

1-3 of 3

View All

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514179	12437286	POX4040 - POX4040.pdf	01/23/2024 12:54:41PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514178	12437287	POX4041 - POX4041.pdf	01/23/2024 12:54:41PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	5514177	12437288	POX4042 - POX4042.pdf	01/23/2024 12:54:34PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [POX404X – POX404X.pdf](#) link

### Example of Report Output(s):

## PO Schedule Listing by PO Date

[illegible]

## PO Schedule Listing by Supplier

[illegible]

## PO Schedule Listing by Buyer

ORACLE®

Report ID: POX4042  
User ID: DBROCHU  
Run Control: Run\_Schedule\_Listings

PeopleSoft Purchasing

PO SCHEDULE LISTING BY BUYER

Page No. 1  
Run Date 1/23/2024  
Run Time 9:54:34 AM

PO Dates Included: 7/1/2022  
Buyer: Eric Kenneth Brooks

Thru: 12/31/2023

Contract ID	Ref	Supplier ID	Line	Item ID	Item Description	Sch	Shipto ID	Due Date	Order Qty	UOM	CUR	Amount	Rev	Freight	Ship Via
Business Unit: 02140	PO ID:	0000053389	PO Date:	7/21/2023											
0000000000000000000000000039535	78		1		blood toxicology testing	1	PDP5WT B001	7/21/2023	1.00	EA	USD	358.00		FORBEST	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](#)[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 Run\_POPO009

Report Manager Process Monitor Run

Language English

**Report Request Parameters**

Business Unit

GL Business Unit

Department

☐ Include Cancelled POs?

☐ Include Open/Pending Appr POs?

**From Date**

Option

Nbr Days

Date

**Through Date**

Option

Nbr Days

Date

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 Run\_POPO009 [Report Manager](#) [Process Monitor](#) [Run](#)

Language English

**Report Request Parameters**

Business Unit  



GL Business Unit  

Department  



☒ Include Cancelled POs?

☒ Include Open/Pending Appr POs?

**From Date**

Option   Nbr Days  Date  

**Through Date**

Option   Nbr Days  Date  

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

**Click Save button**

**Click Run button**

The Process Scheduler Request page displays:

Process Scheduler Request

Help

User ID DBROCHURun Control ID Run\_POPO009

Server Name

Run Date01/23/2024

Recurrence

Run Time1:29:21PM

Time Zone

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Activity	POPO009	SQR Report	Web	PDF	Distribution

OK

Cancel

Refresh

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\_POPO009

Report Manager Process Monitor

Run

LanguageEnglish

Process Instance:12437302

Click the [Process Monitor](#) link. The Process List page displays:

Process ListServer List

View Process Requests

User IDDBROCHU

Type

Last

20

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	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”

Click on [Report Manager](#) link, then Click on the Administration tab

Report Manager

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

20

Minutes

Refresh

Status

Folder

Instance

to

Report List

1-1 of 1

View All

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514192	12437302	PO Activity	01/23/2024 1:30:03PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [PO Activity](#) link

Example of Report Output

Report ID: POP0009											
PeopleSoft Financials											
PURCHASE ORDER ACTIVITY REPORT											
Page 1 of 10761											
Run Date 01/23/2024											
Run Time 13:30:20											
PO Business Unit : 02140--Public Safety						PO Create Dates Included : Thru					
GL Business Unit : 02140--Public Safety						Include Cancelled POs :					
Department : --						Include Open/Pending Approval POs :					
						Y					
						Y					
Create Dt/ Status	Due Dt	Supplier/ Buyer	PO ID/ Line/Schd	Category/ Descr	Mfg Item Id/ Manufacturer	Item Id/ Descr	Order Qty	Price	UOM	Extended Price	Curr
03/22/2007 Complete	04/21/2007	Applied Biosystems VFERRIS	0000010450 1/1	17599 LAB. EQUIP, PARTS & SUPPLIES		BUFFER/FORMAMIDE/	1.00		0.00 EA	0.00	USD
03/22/2007 Complete	04/21/2007	Applied Biosystems VFERRIS	0000010452 1/1	17599 LAB. EQUIP, PARTS & SUPPLIES		000000000000000643 LABORATORY SUPPLIES, CHEMICALS & REAGENTIN ACCORDANCE WITH THE	1.00		0.00 EA	0.00	USD
02/12/2015 Complete	03/14/2015	Elsag North America LLC AGEE	0000031839 1/1	05506 AUTOMOTIVE PARTS		DPS LICENSE PLATE READER EQUIPMENT UPGRADE	1.00		0.00 EA	0.00	USD
11/17/2016 Complete	12/17/2016	Fisher Scientific Company LLC AGEE	0000036821 1/1	17599 LAB. EQUIP, PARTS & SUPPLIES		headspace vials 20mm x1; headspace vials and closures 10pk x1	1.00		0.00 EA	0.00	USD
10/07/2021 Complete	11/06/2021	Grainger KHOUGH	0000048907 1/1	32099 FASTENERS NOT OTHERWISE CLASSI		Fasteners / 35% DISCOUNT	1.00		0.00 EA	0.00	USD
06/10/2010 Complete	07/10/2010	Ray Beane Incorporated MBEAN2	0000021189 1/1	86325 TIRES, ALL TYPES		PASSENGER CAR TIRES	2.00		0.00 EA	0.00	USD
07/13/2010 Complete	08/12/2010	Ray Beane Incorporated MBEAN2	0000021293 1/1	86325 TIRES, ALL TYPES		PRICING BASED ON CURRENT PRICE LIST	1.00		0.00 EA	0.00	USD
04/17/2018 Complete	05/17/2018	Ray Beane Incorporated MBEAN2	0000040254 1/1	86325 TIRES, ALL TYPES		PASSENGER CAR TIRES	1.00		0.00 EA	0.00	USD
						PRICING BASED ON CURRENT PRICE LIST					
						PURSUIT AND PERFORMANCE TIRES					



## 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](#)[Find an Existing Value](#)

\*Run Control ID

Run\_VTPO8002

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\_VTPO8002)

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

**Vt Run Pos8002**

Run Control ID Run\_VTPO8002

Report Manager Process Monitor Run

Language English

**Report Request Parameters**

Business Unit GL:

\*Budget Date From:

\*To:

Remaining Amount:  0.000

REQ Status:

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

**ChartField Sort Options**

Personalize | Find | View All |   First 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
ACCOUNT	Account	<input type="text"/>	<input type="text"/>

Run Query VT\_PO8002 for 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 Control ID Run\_VTPO8002 Report Manager Process Monitor **Run**

Language English

**Report Request Parameters**

Business Unit GL: 02140 \*Budget Date From: 07/01/2022 \*To: 06/30/2023

Remaining Amount: 0.000 This report will return data meeting either

REQ Status: Approved of the criteria specified in this box.

**ChartField Sort Options** Personalize Find View All First 1 of 1 Last

*ChartField	Short Name	From ChartField Value	To ChartField Value
ACCOUNT	Account		

Run Query VT\_PO8002 for VTPO8002 output

Save Notify Add Update/Display

**Click Save button**

**Click Run button**

The Process Scheduler Request page displays:

Process Scheduler Request

User ID DBROCHU Run Control ID Run\_VTPO8002

Server Name  Run Date 01/23/2024  
Recurrence  Run Time 1:46:08PM  
Time Zone  [Reset to Current Date/Time](#)

**Process List**

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

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

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

Language English

[Report Manager](#) [Process Monitor](#) [Run](#)

Process Instance:12437313

Click the [Process Monitor](#) link

The Process List page displays:

Process List [Server List](#)

**View Process Requests**

User ID DBROCHU  Type  Last  20 Minutes  [Refresh](#)

Server  Name  Instance  Range [Clear](#)

Run Status  Distribution Status  ☒ Save On Refresh [Report Manager](#) [Reset](#)

**Process List**

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437313		Run_VTPO8002	SQR Report	VTPO8002	DBROCHU	01/23/2024 1:46:08PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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

begins with

VT\_PO8002

Search

Advanced Search

Search Results

\*Folder View

-- All Folders --

Query

1-1 of 1

>

<

View All

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to 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

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:

AutoSave (on)   Business Unit   VT_POB002_192968989.xlsx   Search										Brochu, Danielle   Comments   Share									
File Home Insert Page Layout Formulas Data Review View Automate Help										Conditional Formatting   Styles   Cells   Editing									
Clipboard   Font   Alignment   Number										Normal   Bad   Good   Neutral   Calculation   Check Cell   Insert   Delete   Format									
A1   RUN PROCESS FIRST																			
A B C D E F G H I J K L M N O P Q R S T U V																			
1 RUN PROCESS FIRST																			
2 Process Instance Business Unit Business Unit GL Req ID Req Status Line Sched Num Distrib Line Num DeptID Class Proj/Grt Fund Account Budget Date From Budget Date To Program Vendor ID Original REQ Amount Liquidated Amount PO Amount Remaining Amount Requester																			
3 12437313 02140 02140 0000001050 C 1 1 1 522430 7/1/2022 6/30/2023 3996.00 3996.00 0.000 0.000 AGE																			
4 12437313 02140 02140 0000001051 C 1 1 1 522440 7/1/2022 6/30/2023 31420.00 31420.00 38418.400 0.000 AGE																			
5 12437313 02140 02140 0000001051 C 2 1 1 522440 7/1/2022 6/30/2023 0.00 0.000 0.000 0.000 AGE																			
6 12437313 02140 02140 0000001051 C 3 1 1 522440 7/1/2022 6/30/2023 0.00 0.000 0.000 0.000 AGE																			
7 12437313 02140 02140 0000001051 C 4 1 1 522440 7/1/2022 6/30/2023 0.00 0.000 0.000 0.000 AGE																			
8 12437313 02140 02140 0000001051 C 5 1 1 522440 7/1/2022 6/30/2023 6998.40 6998.400 0.000 0.000 AGE																			
9 12437313 02140 02140 0000001052 C 1 1 1 522600 7/1/2022 6/30/2023 514.95 514.950 4449.950 0.000 AGE																			
10 12437313 02140 02140 0000001052 C 2 1 1 522600 7/1/2022 6/30/2023 5149.95 5149.950 0.000 0.000 AGE																			
11 12437313 02140 02140 0000001054 C 1 1 1 522400 7/1/2022 6/30/2023 1198.00 1198.000 0.000 0.000 KIRISH																			
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																			
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																			
14 12437313 02140 02140 0000001054 C 4 1 1 522400 7/1/2022 6/30/2023 196.00 196.000 0.000 0.000 KIRISH																			
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																			
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																			
17 12437313 02140 02140 0000001054 C 7 1 1 522400 7/1/2022 6/30/2023 298.00 298.000 0.000 0.000 KIRISH																			
18 12437313 02140 02140 0000001054 C 8 1 1 522400 7/1/2022 6/30/2023 4134.00 4134.000 0.000 0.000 KIRISH																			
19 12437313 02140 02140 0000001054 C 9 1 1 522400 7/1/2022 6/30/2023 258.00 258.000 0.000 0.000 KIRISH																			
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																			
21 12437313 02140 02140 0000001054 C 11 1 1 522400 7/1/2022 6/30/2023 4100.00 4100.000 0.000 0.000 KIRISH																			
22 12437313 02140 02140 0000001054 C 12 1 1 520100 7/1/2022 6/30/2023 2500.00 2500.000 0.000 0.000 KIRISH																			
23 12437313 02140 02140 0000001054 C 13 1 1 520100 7/1/2022 6/30/2023 8400.00 8400.000 0.000 0.000 KIRISH																			
24 12437313 02140 02140 0000001054 C 14 1 1 520100 7/1/2022 6/30/2023 354.00 354.000 0.000 0.000 KIRISH																			
25 12437313 02140 02140 0000001054 C 15 1 1 520100 7/1/2022 6/30/2023 500.00 500.000 0.000 0.000 KIRISH																			
26 12437313 02140 02140 0000001054 C 16 1 1 520100 7/1/2022 6/30/2023 12500.00 12500.000 0.000 0.000 KIRISH																			
27 12437313 02140 02140 0000001054 C 17 1 1 520100 7/1/2022 6/30/2023 22638.00 22638.000 0.000 0.000 KIRISH																			
28 12437313 02140 02140 0000001054 C 18 1 1 520100 7/1/2022 6/30/2023 9350.00 9350.000 0.000 0.000 KIRISH																			
29 12437313 02140 02140 0000001054 C 19 1 1 520100 7/1/2022 6/30/2023 9675.00 9675.000 0.000 0.000 KIRISH																			
30 12437313 02140 02140 0000001054 C 20 1 1 520100 7/1/2022 6/30/2023 1598.00 1598.000 0.000 0.000 KIRISH																			

## 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](#)[Find an Existing Value](#)

\*Run Control ID Run\_POX1100

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\_POX1100)

Click the Add Button

The PO/Requisition Xref page displays:

**PO/Requisition Xref**

Run Control ID Run\_POX1100

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 PO/Requisition Xref page:**

- **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
- **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      Report Manager Process Monitor **Run**

Language English ▾

**Report Request Parameters**

From Date 07/01/2023 📅      Through Date 12/31/2023 📅

Business Unit 02140 🔍

**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\_POX1100

Server Name ▾      Run Date 01/23/2024 📅

Recurrence ▾      Run Time 2:19:28PM      **Reset to Current Date/Time**

Time Zone 🔍

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition to PO XREF Report	POX1100	BI Publisher	Web ▾	PDF ▾	Distribution

**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

Report Manager Process Monitor [Run](#)

Language English

Process Instance:12437321

Click the [Process Monitor](#) link

## The Process List page displays:

Process List Server List

View Process Requests

User ID DBROCHU

Type

Last

20 Minutes

[Refresh](#)

Server

Name

Instance  [Range](#)

[Clear](#)

Run Status

Distribution Status

☒ Save On Refresh

[Report Manager](#)

[Reset](#)

Process List

1-1 of 1

>

>

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437321		Run_POX1100	BI Publisher	POX1100	DBROCHU	01/23/2024 2:19:28PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For

User ID DBROCHU

Type

Last

5 Minutes

[Refresh](#)

Status

Folder

Instance  to

Report List

1-1 of 1

>

>

View All

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514209	12437321	<a href="#">POX1100 - POX1100.pdf</a>	01/23/2024 2:20:43PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [POX1100 – POX1100.pdf](#) link

### Example of Report Output

ORACLE

Report ID: POX4010

User ID: DBROCHU

Run Control: Run\_POX1100

PeopleSoft Purchasing

REQUISITION TO PO XREF REPORT

Page No. 1

Run Date 1/23/2024

Run Time 14:20:43 PM

Req Dates Included : 07/01/2023 Thru: 12/31/2023

Business Unit: 02140

Requisition					Purchase Order										
ID	Lin	Sch/Dst	Date	Item ID	Description	Quantity	UOM	PO ID	Contract ID	Rel	Ship Date	Lin/Sch/Dst	Quantity	CUR	Price
0000001101	1	1	1	07/03/2023	TSU Sprinter Van white built to specifications listed	1.00	EA	0000053207		0	08/02/2023	1 1 1	1.00	USD	219,577.23
Requisition Name: PS-100626										Attention To : Katie R Irish					
0000001102	1	1	1	07/05/2023	GNSS Data Collection Kit	8.00	EA	0000053478		0	08/04/2023	1 1 1	8.00	USD	2,933.27
Requisition Name: PS-100602										Attention To : Katie R Irish					
0000001103	1	1	1	07/05/2023	Crye Precision 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					
	2	1	1	07/05/2023	Crye Precision G3 Combat Shirt	24.00	EA	0000053427		0	08/04/2023	2 1 1	24.00	USD	157.80
Requisition Name: PS-100604										Attention To : Katie R Irish					
	3	1	1	07/05/2023	Airflex Combat Knee pad style 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					
	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					
0000001104	1	1	1	07/07/2023	Stove Prop - 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					
	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					
	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					
	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					

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](#)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

Language English

Report Manager Process Monitor Run

☒ Specified Language ☐ Recipient's Language

**Report Request Parameters**

Business Unit

Requisition ID

From Date

Through Date

Requester

**Statuses to Include**

☐ Approved ☐ Canceled ☐ Completed ☐ Open ☐ Pending

Select All

NOT On Hold

Save Notify

Add Update/Display

### 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 Manager
Process Monitor
Run

Language English
Specified Language
Recipient's Language

### Report Request Parameters

Business Unit 01110
Requisition ID
From Date 07/01/2023
Through Date 12/31/2023
Requester

#### Statuses to Include

☒ Approved
☒ Canceled
☒ Completed
☒ Open
☒ Pending

Select All

NOT On Hold

Save
Notify
Add
Update/Display

Click Run button

### The Process Scheduler Request page displays:

## Process Scheduler Request

User ID DBROCHU
Run Control ID Run\_PORQ010

Server Name
Run Date 01/23/2024
Recurrence
Run Time 2:32:10PM
Time Zone
Reset to Current Date/Time

### Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Requisition Print SQR	PORQ010	SQR Report	Web	PDF	Distribution

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

Report Manager Process Monitor **Run**

Language English

☒ Specified Language ☐ Recipient's Language

Process Instance:12437322

Click the [Process Monitor](#) link, The **Process List** page displays:

Process List Server List

View Process Requests

User ID DBROCHU

Type

Last

5

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

☒ Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437322		Run_PORQ010	SQR Report	PORQ010	DBROCHU	01/23/2024 2:32:10PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For

User ID DBROCHU

Type

Last

5

Days

Refresh

Status

Folder

Instance

to

Report List

1-47 of 47

View All

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514210	12437322	<a href="#">Requisition Print SQR</a>	01/23/2024 2:33:10PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [Requisition Print SQR](#) link

## Example of Report Output

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1		Lasermate 20 Offline - Base w/Nester Serial #379		2.0000	EA	50.00	100.00	11/21/2018
<p>Buyer: Linda T Wortman Attn: Karen L Symonds</p>								
<p>Line Total:</p>							100.00	
<p>Total Requisition Amount:</p>							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](#)Find an Existing Value

\*Run Control ID Run\_POX6100

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\_POX6100)

Click the Add Button

The Requisition/RFQ Xref Report page displays:

**Requisition/RFQ Xref Report**

Run Control ID Run\_POX6100

Report Manager Process Monitor Run

Language English

**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 for all 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**

Language **English** ▼

---

**Report Request Parameters**

Business Unit  🔍

From Date  📅      Through Date  📅

**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\_POX6100

---

Server Name  ▼      Run Date  📅

Recurrence  ▼      Run Time       **Reset to Current Date/Time**

Time Zone  🔍

---

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	POX6100	POX6100	BI Publisher	<input type="text" value="Web"/> ▼	<input type="text" value="PDF"/> ▼	Distribution

**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 Requisition/RFQ Xref Report page displays 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:

Process List Server List

View Process Requests

User ID DBROCHU Q

Type  Last  5 Minutes  Refresh

Server  Name  Q Instance  Range  Clear

Run Status  Distribution Status  ☒ Save On Refresh Report Manager Reset

Process List

1-1 of 1 View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	12437331		Run_POX6100	BI Publisher	POX6100	DBROCHU	01/23/2024 2:54:24PM EST	Success	Posted	<a href="#">Details</a>	<a href="#">Actions</a>

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 Reports For

User ID DBROCHU Q

Type  Last  5 Minutes  Refresh

Status  Folder  Instance  to

Report List

1-1 of 1 View All

Select	Report ID	Prcls Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514218	12437331	<a href="#">POX6100 - POX6100.pdf</a>	01/23/2024 2:55:36PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

Click on [POX6100 – POX6100.pdf](#) link

Example of Report Output

<div><div>ORACLE</div><div><div>Report ID</div><div>Use ID:</div><div>Run Control ID:</div></div><div><div>POX6100</div><div>SSMITH2</div><div>Run_REQ_RFQ_Xref</div></div><div><div>PeopleSoft Purchasing</div><div>RFQ TO REQUISITION XREF REPORT</div></div><div><div>Page No.</div><div>Run Date</div><div>Run Time</div></div><div><div>1</div><div>1/23/2019</div><div>7:59:22 AM</div></div></div>													
<div>PO Dates Included: 7/1/2018 Thru: 6/30/2019</div> <div>Business Unit: 02140</div>													
<div><div></div><div>Requisition</div><div></div></div>													
RFQ ID	RFQ Date	Line	Item ID	Description	Order Qty	UOM	Price	ID	Line	Quantity	UOM	Supplier ID	Supplier
0000000341	8/10/2018	1		Cargo Trailer	1.00	EA	20000.00	0000000819	1	1.00	EA	0000043710	PURCHASING-001



## 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](#)

Find an Existing Value

\*Run Control ID Run\_PORFQ01

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\_PORFQ01)

Click the Add Button. The Dispatch Quotes page displays:

**Dispatch Quotes**

Run Control ID Run\_PORFQ01

Report Manager Process Monitor Run

Language English Specified Language Recipient's Language

**Process Request Parameters**

Business Unit RFQ ID From Date Buyer

Supplier ID Through Date Fax Cover Page

**Miscellaneous Options**

☐ Test Dispatch

☐ Print Duplicate

☐ Print Copy

**Statuses to Include**

☐ Dispatched

☐ Not Dispatched

☐ Approved

☐ Canceled

☐ Held

**Dispatch Methods to Include**

☒ Print

☒ FAX

☒ EDX

☒ E-Mail

☒ Phone

Save Notify

Add Update/Display

## 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

Report Manager Process Monitor Run

Language English ☒ Specified Language ☐ Recipient's Language

#### Process Request Parameters

Business Unit	<input type="text" value="02140"/>	<input type="text"/>
RFQ ID	<input type="text" value="0000000341"/>	Supplier ID <input type="text" value="0000043710"/>
From Date	<input type="text"/>	Through Date <input type="text"/>
Buyer	<input type="text"/>	Fax Cover Page <input type="text"/>

#### Miscellaneous Options

☐ Test Dispatch

☐ Print Duplicate

☐ Print Copy

#### Statuses to Include

☐ Dispatched ☐ Not Dispatched

☐ Approved ☐ Canceled ☐ Held

#### Dispatch Methods to Include

☒ Print ☒ FAX ☒ EDX ☒ E-Mail ☒ Phone

Save Notify

Add Update/Display

Click Save button

Click Run button

### The Process Scheduler Request page displays:

Process Scheduler Request

Help

User ID DBROCHURun Control ID Run\_PORFQ01

Server Name

Run Date01/23/2024

Recurrence

Run Time3:01:32PM

Time Zone

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	RFQ Dispatch/Print	PORFQ01	SQR Report	Web	PDF	Distribution
<input type="checkbox"/>	Email	PO_RFQ_EMAIL	Application Engine	Web	TXT	Distribution
<input type="checkbox"/>	RFQ dispatch & E-mail	RFQDISP	PSJob	(None)	(None)	Distribution

OKCancel

### 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

LanguageEnglish

Report Manager

Process Monitor

Run

Specified Language

Recipient's Language

Process Instance:12437337

### Click the [Process Monitor](#) link, The Process List page displays:

Process List

Server List

View Process Requests

User IDDBROCHU

Type

Last

5

Minutes

Refresh

Server

Name

Instance

Range

Clear

Run Status

Distribution Status

Save On Refresh

Report Manager

Reset

Process List

1-1 of 1

View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	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 Manager

List

Explorer

Administration

Archives

View Reports For

User ID

DBROCHU

Type

Last

5

Minutes

Refresh

Status

Folder

Instance

to

Report List

<

<

1-1 of 1

>

>

View All

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514222	12437337	RFQ Dispatch/Print	01/23/2024 3:02:34PM	Acrobat (*.pdf)	Posted	Details


Click on [RFQ Dispatch/Print](#) link

Example of Report Output

State of Vermont

Return Bid To:  
Buildings and General Services  
Office of Purchasing & Contracting  
109 State St  
Montpelier VT 05609-3001

Request for Quotation



Request Quote ID.	Date	Buyer	Page
02140-0000000341	08/10/2018	Steven D Smith	1
Payment Terms	Date Quote Open	Closing	
Net 30	09/06/2018	09/20/2018 16:30:00	
Requisition:	0000000819		

Ship To:

DPS - Fire Academy  
93 Davidson Drive  
Pittsford VT 05764  
United States

Line	Item	Description	UOM	Quantity	Unit Price	Extended Amount
1		Cargo Trailer	EA	1.00		

Freight Terms:

FOBDEST

Ship Via:

BESTWAY

IN ACCORDANCE WITH THE SPECIFICATIONS LISTED BELOW:  
Width: 8 feet  
Length: minimum 20 feet  
Interior Height: Minimum 7 feet  
Body Style: Radius Front/round top  
14,000 lbs GVW  
Tandem 7,000 lbs axles  
14 ply radial tires  
Spring assisted rear ramp door  
32" side hinged door on passenger side  
All exterior doors shall be equipped with cam lock hardware or equivalent capable of being padlocked.  
Minimum 24" Aluminum stone guard on front  
Rear stabilizing jacks  
5,000 lbs tongue jack