

Purchase Order Detail Activity Report

Usage

This report lists all activity (encumbrances, alterations, and payments) associated with purchase orders depending on the search criteria and line information provided:

Search Criteria

- Business Unit (Required Field)
- Purchase Order From – To
- Purchase Order Date From – To
- Vendor ID
- Buyer ID
- Purchase Order Type

Line Information

- Fund Code From –To
- Account From – To
- Dept ID From – To
- Program Code From – To
- Project From – To
- Class From – To
- Monetary Amount <=

Although this is a formatted report, i.e., you will not be able to download it to Excel, you have control over the level of detail you want for your report.

The output is a formatted report with the following columns:

Report Field

Row Title	Definition
PO Number	Purchase Order Number
Doc Date	Date of transaction
Type	Purchase Order Type
Status	PO Status
Ln-Sch-Dst	Number of line item, schedule, and distribute row
Ap	Accounting Period or month of transaction
Year	Budget year
Source Txn	Transaction source
Monetary Amount	Transaction amount
Line Status	Status of line item
Fund	Chartfield – fund code
Deptid	Chartfield – department code
Account	Chartfield – account code
Prgm	Chartfield – program code
Project ID	Project name
Class	Chartfield – class code
Acctg Dt	Accounting date
Budgt Dt	Budget date
Voucher	Voucher number
Vendor Name	Name of vendor

Example 1: PO Activity Report for one PO only

1. On PO Activity page:

- Select FRSNO for Business Unit.
- In Search Criteria, key in 10-digit Purchase Order number in From Purchase Order and To Purchase Order.
- In Line Information, the default is to leave all selection parameters blank. The results will yield all activity for the purchase order specified.
- Click Run.

PO Activity

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

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

'Business Unit:

From Purchase Order: To Purchase Order:

From Purchase Order Date: To Purchase Order Date:

Vendor ID:

Buyer:

PO Type:

Line Information

From Fund Code: To Fund Code:

From Account: To Account:

From Department: To Department:

From Program Code: To Program Code:

From Project: To Project:

From Class: To Class:

Amount <=

2. On Process Scheduler Request Page:

- Make sure that Server Name is “PSUNX”. “PSNT” could cause problems when running sqrs (which is what this process is). Sometimes they go into a posting state and you can’t cancel them. ALWAYS make sure sqr processes are run on PSUNX.
- Activate the check box for PO Activity Report. *If the purchase order is open, then activate the check box for Open PO Activity.* Make sure that Type is “Web” and Format is “PDF”. Click OK.

Process Scheduler Request

User ID: 11439 Run Control ID: REPORT

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input type="checkbox"/>	Open PO Activity	CSUP0051	SQR Report	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Activity Report	CSUP0052	SQR Report	Web	PDF	Distribution

3. On PO Activity Page, click Report Manager. Click Refresh until you see “Posted” under Status, then click on the Details link.

4. On Report Detail Page, click on the pdf link to get your Purchase Order Activity report. You can view it or print it. The first page of the PO Activity Report will list the parameters you selected.

Report Detail

Report

Report ID: 120599 Process Instance: 156572 [Message Log](#)

Name: CSUP0052 Process Type: SQR Report

Run Status: Success

PO Activity Report

Distribution Details

Distribution Node: FFRPRD Expiration Date:

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,621	08/15/2006 11:18:41.000000AM PDT
csup0052_156572.PDF	7,415	08/15/2006 11:18:41.000000AM PDT
Trace File	222	08/15/2006 11:18:41.000000AM PDT

Distribute To

Distribution ID Type	Distribution ID
User	11439

Example 2: PO Activity Report for one month for one department

1. On PO Activity Page:

- Select FRSNO for Business Unit.
- In Search Criteria, fill in From Purchase Order Date and To Purchase Order to establish the range. In this example, I requested activity for one month for one department for current year General Fund. This request will take longer to process compared to Example 1 where activity was requested for one purchase order only.
- In Line Information, fill in From Fund Code and To Fund Code. You can further narrow your search by keying in other parameters. The default is to leave all line information parameters blank but this will result in a report of you all purchase orders within the date range selected under all fund codes for all departments on campus.
- Click Run.

PO Activity

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

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

'Business Unit:

From Purchase Order: To Purchase Order:

From Purchase Order Date: To Purchase Order Date:

Vendor ID:

Buyer:

PO Type:

Line Information

From Fund Code: To Fund Code:

From Account: To Account:

From Department: To Department:

From Program Code: To Program Code:

From Project: To Project:

From Class: To Class:

Amount <=

2. On Process Scheduler Request Page:

- Make sure that Server Name is “PSUNX”. “PSNT” could cause problems when running sqrs (which is what this process is). Sometimes they go into a posting state and you can’t cancel them. ALWAYS make sure sqr processes are run on PSUNX
- Activity the check box for PO Activity Report. *Because I expect to have open purchase orders from this period, I will check the check box for Open PO Activity.*
- Make sure that Type is “Web” and Format is “PDF”. Click OK.

Process Scheduler Request

User ID: 11439 Run Control ID: REPORT

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Open PO Activity	CSUP0051	SQR Report	Web	PDF	Distribution
<input checked="" type="checkbox"/>	PO Activity Report	CSUP0052	SQR Report	Web	PDF	Distribution

3. On PO Activity Page, click Report Manager. Click Refresh until you see “Posted” under Status, then click on the Details link.

4. On Report Detail Page, click on the pdf link to get your PO Activity report. You can view it, or print it.

Report Detail

Report

Report ID: 120606 Process Instance: 156586 [Message Log](#)

Name: CSUP0052 Process Type: SQR Report

Run Status: Success

PO Activity Report

Distribution Details

Distribution Node: FFRPRD Expiration Date:

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,621	08/15/2006 11:32:38.000000AM PDT
csupo052_156586.PDF	7,417	08/15/2006 11:32:38.000000AM PDT
Trace File	222	08/15/2006 11:32:38.000000AM PDT

Distribute To

Distribution ID Type	Distribution ID
User	11439

- On Report Detail Page, click on the pdf link to get your Open PO Activity report. The first page of the PO Activity Report will list the parameters you selected. You can view it, print it, or save it.

Report Detail

Report

Report ID: 120605 **Process Instance:** 156585 [Message Log](#)
Name: CSUP0051 **Process Type:** SQR Report
Run Status: Success

Open PO Activity

Distribution Details

Distribution Node: FFRPRD **Expiration Date:** 08/29/2006

File List

Name	File Size (bytes)	Datetime Created
Message Log	1,621	08/15/2006 11:43:20.000000AM PDT
csupo051_156585.PDF	6,922	08/15/2006 11:43:20.000000AM PDT
Trace File	227	08/15/2006 11:43:20.000000AM PDT

Distribute To

Distribution ID Type	Distribution ID
User	11439

OK Cancel