Standard Purchasing Reports

Chapter 8
Standard Purchasing Reports

Section Objectives

At the end of this section, you should be able to:

- Run standard reports
- Review the Concurrent Manager for requests
- Save reports for viewing on-line
- View diagnostics, request logs, and reports online
- Reprint reports
- Cancel submitted requests
Standard Purchasing Reports

• Standard reports are pre-defined reports that help you manage your documents and items

• Users have access to certain reports based on their responsibility

• Reports may be run at any time and are submitted via the Submit Requests form

• Reports may not be executed immediately when requested. A report request is sent to a utility program called the Concurrent Manager.
  – The Concurrent Manager coordinates the processing of several requests simultaneously
  – You can do other tasks while the Concurrent Manager is processing your request

• Users have the option of reviewing the output of a report online in addition to printing a hard copy of the output

Purchasing Application Standard Reports

Purchase Order Detail Report
Contains purchase order header, line and shipment detail. This report does not include account distribution.

Purchase Order Distribution Detail Report
Contains purchase order header, line and shipment detail, plus account distribution.

Printed Requisitions Report
Produces a hard copy of a purchase requisition, including account distribution.
Standard Purchasing Reports

Purchase Requisition Status Report

Prints purchase requisition detail. This report includes the PO number if the requisition has been created into a PO. However, this report does not include account distribution information.

Standard Notes Listing

Prints a list of the Standard Notes.

In addition to the reports listed above, Level 2 and Level 3 Purchasers/Approvers have access to the following reports.

Open Purchase Orders Report (by Buyer)

Prints a list of all open Purchase Orders created by a specific buyer. This report also allows you to specify a Vendor.

Open Purchase Orders Report (by Cost Center)

Prints a list of all open Purchase Orders charged to a specific department. This report also allows you to specify a Vendor.

List of PO's & Reqs Under $ Limit

Prints line item and account number information for PO's within specified dollar, date, and account number ranges.
Report Parameters

- Most print requests require you to enter parameter values so you can specify the scope of information you want to see in the output

- Prompts in the Parameters window are specific to the request you select

Sample parameters for a Purchase Order Detail report

- Some parameter fields have a List of Values available to ensure you choose a valid parameter value while other parameters are optional and require no value

- Default values may be predefined for one or more of the parameters associated with your request

- Default values are automatically applied to these parameters when the Parameters window is opened
Purchase Order Distribution Detail Report

Print a Purchase Order Distribution Detail report for the Purchase Order you entered to the Burrows Company for the cases of blue and yellow cover gowns. Review the report online. Print a hard copy of the report.

1. Navigate to the Submit Request window

   Oracle Purchasing
   N → Reports → Run
   Submit a New Request
   Submit Request

2. Select the Type of request
   - Single Request

3. Click on OK
4. Click on the LOV in the Name field to see a list of available reports

5. Select desired report
   - Purchase Order Distribution Detail Report
Purchase Order Distribution Detail Report

6. Enter Parameters

- **PO Numbers From**  Use Burrows Company PO #
- **To**  Same as above
- **Failed Funds Only**  No

7. Click on **OK** to return to the **Submit Request** window

![Submit Request Window]

8. Click on the **Options** button to open the **Upon Completion** window

9. Verify that a checkmark appears in the **Save all Output Files** box
   - This allows the report to be viewed online

10. Select **Style**
    - Landscape
11. Select the Printer
   - Printer name displayed in the Printer field should be your default printer

12. Enter number of Copies
   - 0
   - Entering a zero (0) indicates you want to view the report online
   - Entering a one (1) indicates you want a hard copy of the report

13. Click on OK to return to the Submit Request window

14. Click on the Submit button
   - This automatically opens the Requests window
15. Determine if your report is completed
   - Check the Phase field to see if it says Completed
   - If the report is still running, click on the Refresh Data button to refresh the screen

16. Click on the View Output button to view the report online once it completes running
   - Page 1 lists the parameters you selected
   - Pages 2 through the last page contain the contents of the report

17. Use the scroll bars and navigation buttons to move through the report
   - Vertical/horizontal scroll bars move you through a single page of the report
   - Go To, First, Previous, Next and Last buttons move you to different pages of the report
   - To see more of the report on the screen, decrease the font size
   - To see the total number of pages in the report, click on Last, then look at the Page number in the upper left-hand corner of the window
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Report Contents

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Department Purchaser R12

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Reprint Option

To print a hard copy of the report after viewing it online, start at the Navigator window.

1. Navigate to the Find Requests window

Oracle Purchasing
N → Reports → View
Find Requests

2. Accept the default request choice
   - All My Requests

3. Click on Find to open the Requests window
Reprint Option

4. Select the desired report

5. Select Tools, Reprint from the menu bar to open the Reprint Options window

6. Enter the desired options in the Republish and Reprint Request window
   - Printer       Your default printer
   - Style        Landscape
   - Copies       1

7. Click on Apply
Cancel a Request

A submitted request can be cancelled if the request is not yet completed - if the Phase is Running, Pending, or Inactive. Follow the steps listed below to cancel a request:

1. Navigate to the Find Requests window

   Oracle Purchasing
   N→ View → Requests
   Find Requests

2. Select My Requests in Progress option

3. Click on the Find button to open the Requests window

4. Select the request to be terminated by positioning the cursor on the appropriate line

5. Click on the Cancel Request button located in the lower left-hand corner

6. Save the transaction
Lab 8: Printed Requisitions Report

Submit a request to run the Printed Requisitions Report for the Purchase Requisition you entered to B&B Microscopes for the six microscopes. Review the report online before printing the hard copy.

Navigate to the Submit Requests window

- N→ Reports → Run → Submit a New Request → Submit Requests

Select Report Name

Specify Parameters
Samples of Standard Reports

Purchase Order Detail Report

Parameters

Report Contents
Samples of Standard Reports

Purchasing Order Distribution Detail Report

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Samples of Standard Reports

Printed Requisitions Report

Parameters

Report Contents
Samples of Standard Reports

Purchase Requisition Status Report

Parameters

Report Contents
Samples of Standard Reports

Standard Notes Listing

Parameters

Report Title: Standard Notes Listing

Usage From:  

To:  

Names From:  

To:  

OK  Cancel  Clear  Help

Report Contents

#001 - Blanket Agreement Limitations

This contract will have been entirely fulfilled when either 1) the specified time period expires or 2) the specified dollar limit has been reached.

There can be no extension arranged for either of these limitations and the University assumes no responsibility to pay for goods or services delivered under expired contracts. Should the department require additional limits, that office is required to initiate a requisition sufficiently in advance of expiration to permit normal processing. A new contract bearing new number identification may be awarded as a result of this processing.

#002 - 30 Day Convenience Termination

This agreement may be terminated by either party upon thirty (30) days written notice.

#003 - Price Certification

The seller certifies that the prices charged against this order are not greater than those charged its most favored customers for like item and quantity under like market conditions.

#004 - Order Adjustments

Any adjustments against this agreement will be considered when addressed in writing to the appropriate buyer thirty (30) days in advance of charged

#005 - SPA Identification

The services identified on this purchase order are procured in accordance with the Texas and Conditions of SPA no. as mutually agree.

The terms and Conditions of SPA no. are incorporated herein by this reference.

#006 - FSTEM Implementation Notification

NOTICE: THE UNIVERSITY OF PITTSBURGH HAS IMPLEMENTED A NEW FINANCIAL ACCOUNTS PAYABLE AND PURCHASING AUTOMATED SYSTEM ON JULY 1, 1997, WHICH COINCIDES WITH THE UNIVERSITY’S FISCAL YEAR. THIS MEANS THE UNIVERSITY WILL

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Samples of Standard Reports

Open Purchase Orders Report (by Buyer)

Parameters

<table>
<thead>
<tr>
<th>Parameters</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Open Purchase Orders Report (by Buyer)</td>
</tr>
<tr>
<td>Buyer Name</td>
<td>Falise, Barbara A</td>
</tr>
<tr>
<td>Vendors From</td>
<td></td>
</tr>
<tr>
<td>To</td>
<td></td>
</tr>
<tr>
<td>Dynamic Precision Option</td>
<td>2</td>
</tr>
</tbody>
</table>

Report Contents

<table>
<thead>
<tr>
<th>Date</th>
<th>Item Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Ordered</th>
<th>Received</th>
<th>Billed</th>
<th>Paid Closed Status</th>
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<td>2.00</td>
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<td>0.00</td>
<td>Yes</td>
</tr>
<tr>
<td>12/12/02</td>
<td>1000 x 4 x 3 ft</td>
<td>1.00</td>
<td>2.00</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Yes</td>
</tr>
<tr>
<td>12/13/02</td>
<td>1000 x 4 x 3 ft</td>
<td>1.00</td>
<td>2.00</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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Samples of Standard Reports

Open Purchase Orders Report (by Cost Center)

Parameters

Report Contents
Samples of Standard Reports

List of PO’s & Reqs under $ Limit

Parameters

Report Contents