

PO Life Cycle Report



Finance users use this job aid to obtain detailed (including cancelled transactions) information for transactions as it flows through the purchasing and accounts payable systems. Details about requisitions, purchase orders, receiving and or vouchers are displayed.

Review/Approval History

Date	By	Action	Pages
July 14 2010	JStone	Original	4

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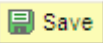
Po Life Cycle Report (CSUPO010):

Navigation:

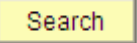
Main Menu > Purchasing > Purchase Orders > Reports > **CSU PO Life Cycle Report**

Set up Run Control

First time User:

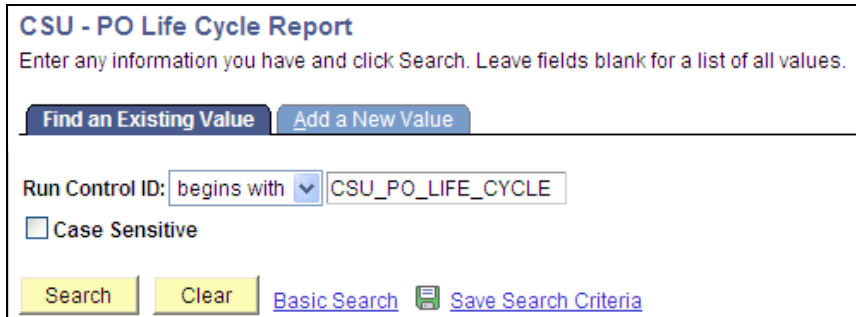
1. Add a New Value
2. Enter a new Run Control name.
3. Click .

Returning User:

1. Click Find an Existing Value.
2. Click .
3. Search Criteria page will display.

Enter Search Criteria:

4. **Select PO using:** select Purchase Order, Requisition or Voucher, depending on what ID information you know.
5. **Process Options:**
 - a. **Business Unit** – enter or use look up.
 - b. **Req ID** – enter the Document ID or use look up. Look up will only return list of respective Document ID numbers.
 - c. **Save.**



CSU - PO Life Cycle Report
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

Case Sensitive


[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)


Figure 1: Run Control



CSU PO Life Cycle Report

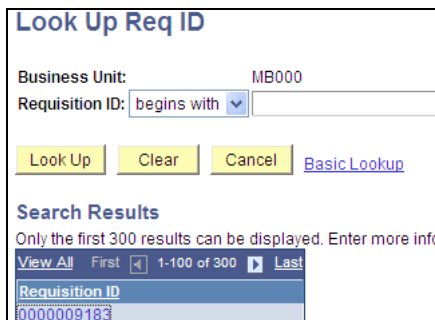
Run Control ID: CSU_PO_LIFE_CYCLE [Report Manager](#) [Process Monitor](#) [Run](#)

Select PO using:
 Purchase Order Requisition Voucher

Process Options
*Business Unit: 
*Req ID: 

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Add](#) [Update/Display](#)

Figure 2: Selection Criteria



Look Up Req ID

Business Unit:

Requisition ID:

[Look Up](#) [Clear](#) [Cancel](#) [Basic Lookup](#)

Search Results
Only the first 300 results can be displayed. Enter more info

[View All](#) [First](#) [Last](#)

Requisition ID
000009183

Figure 3: Look up table (Similar for Requisition, PO or Voucher)

Run Report

1. Click **Run**.
2. Verify that the Server Name is **PSUNX**.
3. Verify that Type is **Web** and Format is **XLS**.
4. Click **OK** to run the report(s).
5. Click **Report Manager** from the **Main Menu** to view the report.
6. Click the **Administration** tab.
7. You may need to click the **Refresh** button until the Report List indicates that the report has run to a **Status = Posted** and the **Details link** is active.
8. Click **Details** to open the Report Details page.
9. Click on the file name "cppo010....PDF".
10. The report will open.

CSU PO Life Cycle Report

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

Select PO using:
 Purchase Order Requisition Voucher

Process Options
 *Business Unit: MB000
 *Req ID: 0000009183

Save **Return to Search** **Previous in List** **Next in List** **Add** **Update/Display**

Figure 4: Run Report

Process Scheduler Request

User ID: frak7001 Run Control ID: CSU_PO_LIFE_CYCLE

Server Name: PSUNX Run Date: 07/15/2010
 Recurrence: Run Time: 10:06:19AM **Reset to Current Date/Time**

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO Life Cycle Report	CSUP0010	SQR Report	Web	PDF	Distribution

OK **Cancel**

Figure 5: Process Scheduler - select PSUNX server

Report Manager Administration

View Reports For
 User ID: frak7001 Type: Last: 1 Days **Refresh**
 Status: Folder: Instance: to:

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1073139	843446	PO Life Cycle Report	07/15/2010 10:07:40AM	Acrobat (*.pdf)	Posted	Details

Figure 6: Report Manager > Administration Tab

Report Detail

Report
 Report ID: 1073139 Process Instance: 843446 [Message Log](#)
 Name: CSUP0010 Process Type: SQR Report
 Run Status: Success

PO Life Cycle Report
 Distribution Details
 Distribution Node: FMBSTG Expiration Date: 07/17/2010

Name	File Size (bytes)	Datetime Created
SQR_CSUP0010_843446.log	1,585	07/15/2010 10:08:21.000000AM PDT
cspo010_843446.pdf	4,466	07/15/2010 10:08:21.000000AM PDT
CSUP0010_843446.out	4,918	07/15/2010 10:08:21.000000AM PDT

Distribute To
 Distribution ID Type *Distribution ID
 User frak7001

Figure 7: Report Details page

Report Example

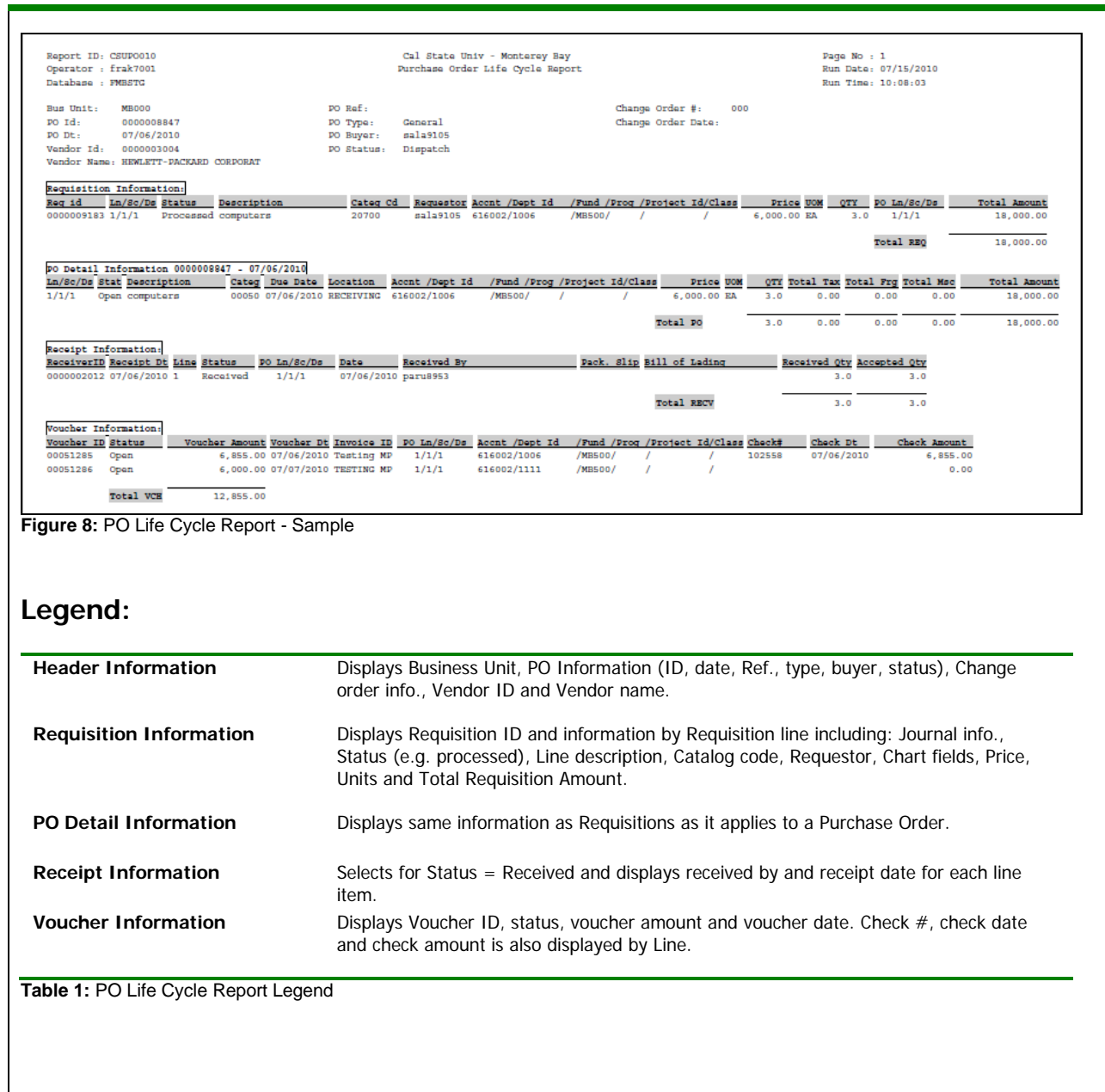


Figure 8: PO Life Cycle Report - Sample

Legend:

Header Information	Displays Business Unit, PO Information (ID, date, Ref., type, buyer, status), Change order info., Vendor ID and Vendor name.
Requisition Information	Displays Requisition ID and information by Requisition line including: Journal info., Status (e.g. processed), Line description, Catalog code, Requestor, Chart fields, Price, Units and Total Requisition Amount.
PO Detail Information	Displays same information as Requisitions as it applies to a Purchase Order.
Receipt Information	Selects for Status = Received and displays received by and receipt date for each line item.
Voucher Information	Displays Voucher ID, status, voucher amount and voucher date. Check #, check date and check amount is also displayed by Line.

Table 1: PO Life Cycle Report Legend