


Quick Reference Guide for Reporting

<p>Overview</p> <p>The ability to view requisitions or purchases is available within the Search History tab</p> <p>BASIC STEPS</p> <ul style="list-style-type: none"> • Select the appropriate search tab – refer to Search Options for more details • Enter search criteria that will narrow down the results to meet your needs • If desired, drill down into specific items • Refer to Available Options for other actions that can be taken <p>SEARCH OPTIONS</p> <p>Each of the searches provide you a different starting point and your search filter information will enable you to narrow down the results to what you need</p> <ul style="list-style-type: none"> • PO history: approved purchases • requisition history: both requisitions that are in the approval queue and approved purchases • my requisitions: quick inquiry into your personal purchases (in process and approved) within the past 30 days • my purchase orders: quick inquiry into your personal purchases (approved) within the past 30 days • receipt history: entered receipts • invoice history: entered invoices • search exports: access to requested report exports <p>FILTER OPTIONS</p> <ul style="list-style-type: none"> • Top section: intended for specific information, such as a PO No. that will return limited results • Otherwise check the Filter check-box to open up the following options: <ul style="list-style-type: none"> • My Orders: will search only your orders • Clemson Orders: will search across all Clemson orders • Orders I reviewed: if you are an approver, will search only orders you reviewed • Filters: allows you to specify a date range, specific users by role and/or originating departments to narrow the search <ul style="list-style-type: none"> • Custom Field Filters: accounting codes to narrow the search • Status Filters: options will vary based on the selected search option and are used to narrow the search <p>AVAILABLE OPTIONS</p> <p>The following options allow you to manipulate your search results or allow you to view more details (drill into). Which options are available depends on the search tab.</p> <ul style="list-style-type: none"> • Sort: click on the column you want to sort by 	<ul style="list-style-type: none"> • Drill into details: click on the active link(s) to view details • Enter a receipt: several of the searches allow you to create a receipt on a selected purchase • Save Query: if you run this same query periodically, you may want to save the query which eliminates the set up time of the search filters • Request Export: creates an Excel file of your search results <p>(1) Tracking my order</p> <p>FIND A REQUISITION</p> <ul style="list-style-type: none"> • From Home page, click search history tab • Click my requisitions tab • <i>OR</i> Click requisition history tab • Click by Requisition • Check Filter check-box • Enter search criteria or select a date range from calendar • Click Search button • Click the Requisition Number link • View the summary, detail, approval status or history and add notes or comments if needed <p>VIEW APPROVAL STATUS AND HISTORY</p> <ul style="list-style-type: none"> • From home/shop page, click My Requisition link in the My Dashboard box • Click the Requisition Number link to query details and requisition approval status • Click Requisition Approvals as well as History to view order action taken on Order. <p>(2) Purchase(s) posted to a specified department</p> <ul style="list-style-type: none"> • From Home page, click search history tab • Click PO History tab • Click by PO No. • Check Filter check-box • Select a date range from calendar • Enter the specified dept in the custom field filter section • Click Search button • You are now viewing the purchases • Refer to Available Options for other actions that can be taken <p>(3) Purchase(s) posted to my project</p> <ul style="list-style-type: none"> • From Home page, click search history tab • Click PO History tab • Click by PO No. • Check Filter check-box • Select a date range from calendar
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- Enter the **specified project** in the custom field filter section
- Click **Search** button
- You are now viewing the purchases
- Refer to **Available Options** for other actions that can be taken

(4) Purchase(s) posted to my department by others



- From **Home** page, click **search history** tab
- Click **PO History** tab
- Click **by PO No.**
- Check **Filter check-box**
- **Select a date range** from calendar
- Highlight one or multiple departments in the **Originating Departments box** and **select the**  **arrow** to place their values into the **selection box**
- Enter your department number in the **Dept** field of the custom field filter section
- Click **Search** button
- You are now viewing the purchases
- Refer to **Available Options** for other actions that can be taken

(5) Purchase(s) have invoices and have no receipt(s)


- From **Home** page, click **search history** tab
- Click **PO History** tab
- Click **by PO No.**
- Check **Filter check-box**
- **Select a date range** from calendar
- If appropriate, enter the **specified dept** in the custom field filter section
- In the PO Status Filter section, highlight **Partially Invoiced, Fully Invoiced and Over Invoiced** and **select the**  **arrow** to place their values into the **selection box**
- In the PO Status Filter section, highlight **No Receipts** and **select the**  **arrow** to place the value into the selection box.
- Click **Search** button
- You are now viewing the purchases
- Refer to **Available Options** for other actions that can be taken

(6) Purchase(s) have receipts and have no invoice(s)

- From **Home** page, click **search history** tab
- Click **PO History** tab
- Click **by PO No.**
- Check **Filter check-box**

- **Select a date range** from calendar
- If appropriate, enter the **specified dept** in the custom field filter section
- In the PO Status Filter section, highlight **Partially Received, Fully Received and Over Received** and **select the**  **arrow** to place their values into the **selection box**
- In the PO Status Filter section, highlight **No Receipts and Requires Receipts** and **select the**  **arrow** to place the value into the selection box.
- Click **Search** button
- You are now viewing the purchases
- Refer to **Available Options** for other actions that can be taken

(7) Requisition(s) require approval

- From **Home** page, click **search history** tab
- Click **requisition history** tab
- Click **by PO No.**
- Check **Filter check-box**
- **Select a date range** from calendar
- If appropriate, enter the **specified dept** in the custom field filter section
- In the PR Status Filter section, highlight **Pending** and **select the**  **arrow** to place their values into the **selection box**
- Click **Search** button
- You are now viewing the purchases
- Refer to **Available Options** for other actions that can be taken

(8) Report Exports

Search results can be exported to Excel.

- Select **Request Export**
- **Enter your file name**
- **Enter a description**
- Select your **Export Type**. Available export types are:
 - **Screen export**: contains only the fields shown on the screen
 - **Transaction export**: contains all of the detailed fields of the transaction including the product and accounting code details
 - **Full Export**: contains multiple exports that are intended for technical interfaces
- **Submit Request**
- **Close**
- Select the **search exports** sub-tab to find your completed export