

How to run the eProcurement Report

All ePro Requisitions for Your School/Dept.

Run this report whenever you want to view an up-to-date list that contains:

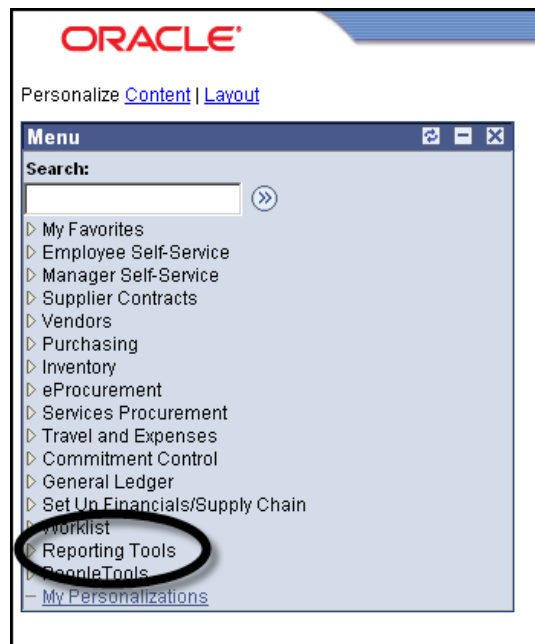
- All ePro requisitions submitted by anyone within your school or department.

Report will display the following details:

- Short description of items ordered
- Quantities ordered
- Dollar amounts spent
- Current status of requisitions
- Budget-checking status
- Requester ID (who placed the order)
- Chartfield strings used in orders

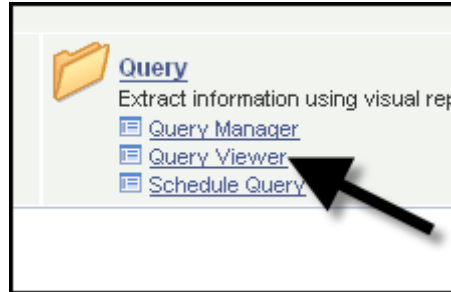
Step 1

After you login PeopleSoft Financials and see the main starting page, click **Reporting Tools** located towards the bottom of the main menu list:



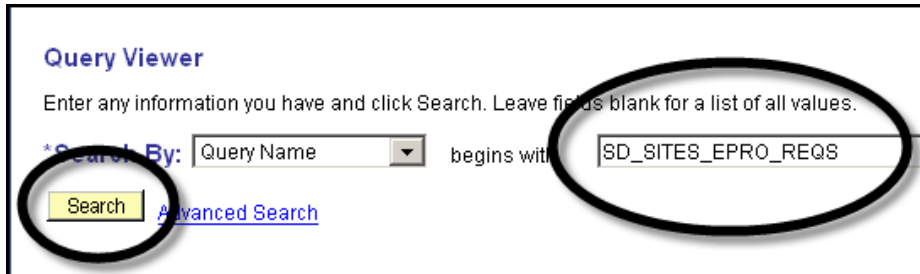
Step 2

Click **Query Viewer**:



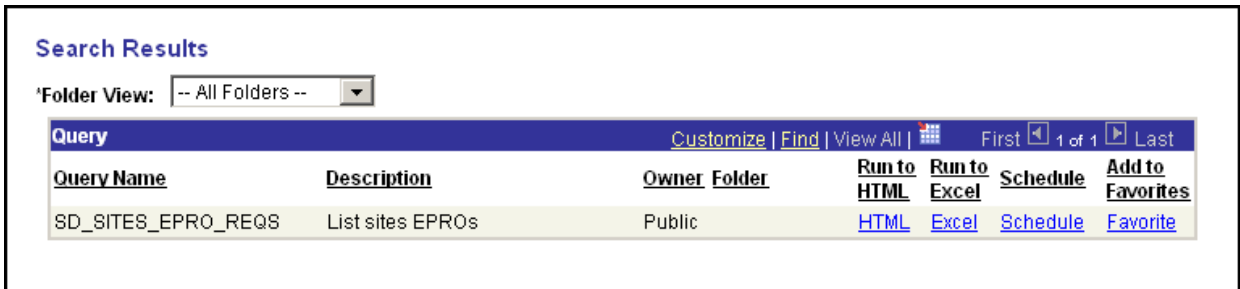
Step 3

On the Query Viewer page, type the name of the query/report in the “**begins with**” text box, and then click the **Search** button. The name of this particular query/report is **SD_SITES_EPRO_REQS**:



Step 4

The results of the search are displayed, and you'll have to make a choice on how to run the query:



Step 5

You must choose whether to run the query to **HTML** or to **Excel**. If you choose HTML, the report will be displayed as a regular PeopleSoft software-type of page on your screen. If you choose Excel, the report will be displayed within an Excel spreadsheet, which makes the data available for editing as you wish. (To print a hardcopy, you must run to Excel).

In these example illustrations, we'll run the query to HTML, and then show you how to download the results to an Excel spreadsheet from the HTML page.

Click the blue HTML link underneath the column title **Run to HTML**:



Step 6

A separate window appears on your screen, containing fields to fill in:

- In the **Department** field, enter your school's or department's 4-digit code number (also called the cost center number).
- In the **Req Date Greater Than** field, enter a past date. This should be the beginning of the time frame you want the report to cover. For example, if you want the report to show all ePro requisitions submitted between March 1, 2009 and June 1, 2009, then the **Req Date Greater Than** field should have the March 1, 2009 date entered into it.
- In the **Req Date Less Than** field, enter the ending date of the time period you want to see (it cannot be a future date; it can be the current date, or a past date).

Observe the following example. We wanted a report that would show all requisitions submitted between January 1, 2009 and June 23, 2009:

A screenshot of a search form. It has three input fields: 'Department' with the value '0003', 'Req Date Greater Than' with the value '01/01/2009', and 'Req Date Less Than' with the value '06/23/2009'. Each date field has a calendar icon to its right. Below the fields is a yellow 'View Results' button.

After you fill in the fields, click the **View Results** button to run the query.

Step 7

The results are displayed in an HTML page, since that's the option we chose (*please see illustration on next page*):

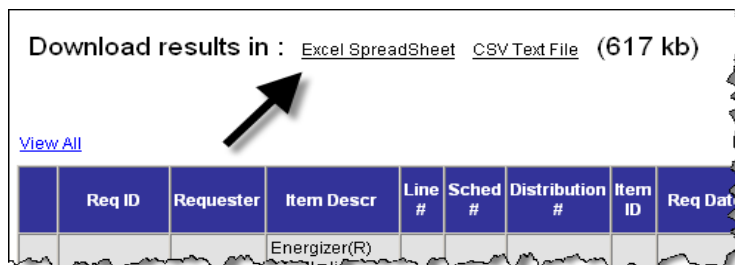
	Req ID	Requester	Item Descr	Line #	Sched #	Distribution #	Item ID	Req Date	Status	BD Hdr Status	BD Ln Status	Origin	UOM	Qty	Item Price	Ext Amt	DeptID	Resource
1	0000090403	122930	Energizer(R) AA Alkaline Industrial Batteries, Box Of 24	1	1	1		01/05/2009	Complete	Valid	Valid	EDX	BOX	3.0000	7.68000	23.040	0003	72500
2	0000090403	122930	Office Depot(R) Brand Glue Stick, 0.32 Oz., Clear	2	1	1		01/05/2009	Complete	Valid	Valid	EDX	EA	42.0000	0.29000	12.180	0003	72500
3	0000090403	122930	Office Depot(R) Brand Correction Fluid, Multipurpose, 20 ml., White	3	1	1		01/05/2009	Complete	Valid	Valid	EDX	EA	12.0000	0.19000	2.280	0003	72500
			Office Depot(R)															

NOTE: The results are lengthy and can't be viewed all in one screen. To view the rest of the results, including dollar amounts spent, you will have to scroll your screen over to the right.

If you want to print the report, it's best to do it after you download the report into an Excel spreadsheet. Otherwise, it won't print out everything displayed...only what you actually see on your screen, even though there is additional data over to one side that you have to scroll to view.

Step 8

At the top, above the results of the query, there is a link called **Excel Spreadsheet**. Click it:



The results from the query/report are displayed in a new window within an Excel spreadsheet. You can then print, save, manipulate the data, format the spreadsheet, etc.:

	1	2	3	4
1	List sites EP	521		
2	Req ID	Requester	Item Descr	Line #
3	0000090403	122930	Energizer(R) AA Alkaline Industrial Batteries, Bo	1
4	0000090403	122930	Office Depot(R) Brand Glue Stick, 0.32 Oz., Cle	2
5	0000090403	122930	Office Depot(R) Brand Correction Fluid, Multipur	3
6	0000090403	122930	Office Depot(R) Brand Schoolmate Composition	4
7	0000090403	122930	Oxford(R) 100 Recycled Twin-Pocket Portfolios,	5
8	0000090403	122930	Office Depot(R) Brand Recycled Deluxe Locking	6
9	0000090403	122930	Office Depot(R) Brand Recycled Deluxe Locking	7
10	0000090403	122930	Pacon(R) Easel Pad, 27 x 34, 1 Ruled	8
11	0000090723	122930	Pacon(R) Standard Pocket Chart, 34 x 50, Blue	1

NOTE: Instead of choosing **Excel Spreadsheet**, you can also choose **CSV Text File**. Clicking CSV Text File will also download the results into an Excel spreadsheet, but it formats all the data as text. Choosing the Excel Spreadsheet download means that the data will be displayed in more of a bookkeeping sort of way, with the data formatted as numbers, more easily adaptable to financial manipulation and calculations.

Here is an illustration of the same query results downloaded into a CSV Text File format:

	1	2	3	4	5	6	7	8	9	10
1	Req ID	Requester	Item Descr	Line #	Sched #	Distribution	Item ID	Req Date	Status	BD Ho
2	90403	122930	Energizer(I	1	1	1		1/5/2009	Complete	Valid
3	90403	122930	Office Dep	2	1	1		1/5/2009	Complete	Valid
4	90403	122930	Office Dep	3	1	1		1/5/2009	Complete	Valid
5	90403	122930	Office Dep	4	1	1		1/5/2009	Complete	Valid
6	90403	122930	Oxford(R)	5	1	1		1/5/2009	Complete	Valid
7	90403	122930	Office Dep	6	1	1		1/5/2009	Complete	Valid
8	90403	122930	Office Dep	7	1	1		1/5/2009	Complete	Valid
9	90403	122930	Pacon(R) E	8	1	1		1/5/2009	Complete	Valid
10	90723	122930	Pacon(R) S	1	1	1		1/8/2009	Complete	Valid

When you are finished viewing, simply close the query window by its black X Close button in its upper right corner.