# 9.2 Creating a PO Activity Report

**Purpose**: Use this document as a reference for creating a Purchase Order Activity Report in ctcLink.

Audience: Purchasing Staff.

- You must have at least one of these local college managed security roles:
- ZZ Purchasing Reporting

You must also set these User Preference Definitions:

- <u>User Preferences: Purchase Order Entry</u>
- Buyer Setup

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

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The **PO Activity Report** can be used by colleges to gather data for SmartProcure public records requests.

### **Creating a PO Activity Report**

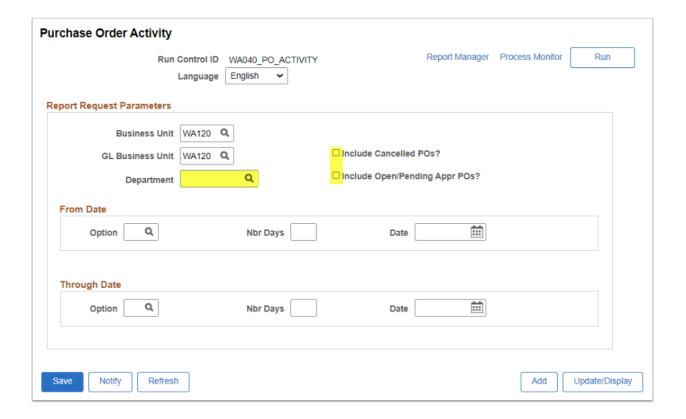
Navigation: Purchasing > Purchase Orders > Reports > Purchase Order Activity

- The PO Activity search page displays. If you have run this process or report in the past, select the Find an Existing Value tab to enter an existing Run Control ID and select the Search button. If this is the first time running this process or report, select the Add a New Value tab to create a new Run Control ID and select the Add button.
  - NOTE: It is important to note that <u>Run Control IDs</u> cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA040\_PO\_ACTIVITY (College, Process).
- 2. The Activity search page displays.
- 3. In the **Report Request Parameters** section, input the desired search parameters:
  - Business Unit

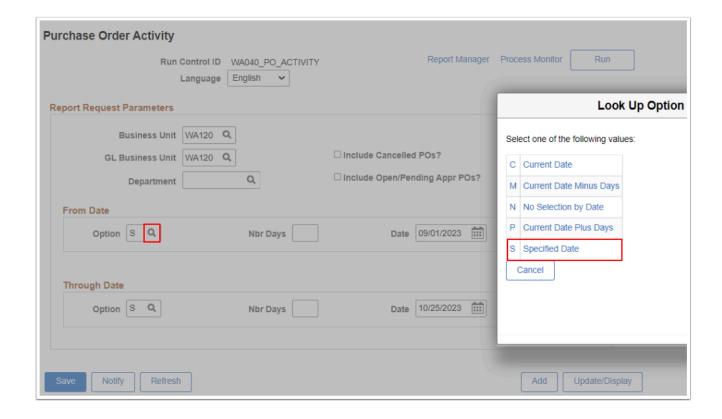
#### · GL Business Unit



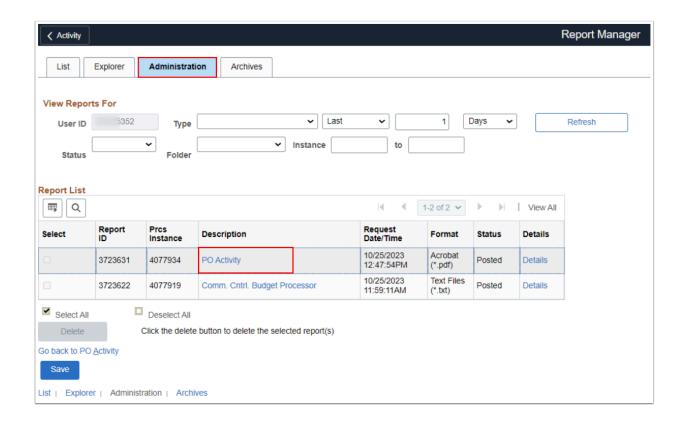
Optional to narrow search results down to a specific **Department**, include **Cancelled POs** or **Open/Pending Approval POs**.



- 4. In the **From Date** and **Through Date** sections, select the desired date range option.
- 5. Optional to select the Look Up Option magnifying glass to select a run date by:
  - **C** = Current Date
  - **M** = Current Date Minus Days
  - **N** = No Selection by Date
  - **P** = Current Date Plus Days
  - S = Specified Date
- 6. Select the **Save** button to save the run control parameters.
- 7. Select the **Run** button to run the process.

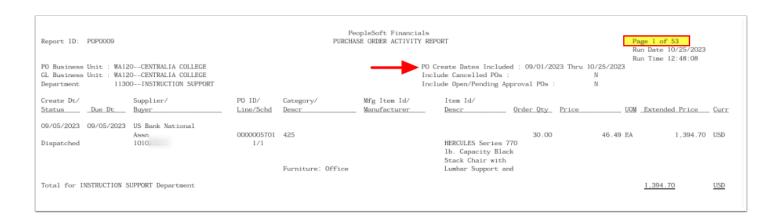


- 10. The **Process Scheduler Request** window opens. Select the **OK** button. Please refer to the <u>Process Schedule Request</u> steps for further instructions.
- 11. The **Purchase Order Activity** page redisplays.
- 12. Select the **Process Monitor** link. For more information, please refer to QRG <u>Process Scheduler/Process Monitor</u>.
- 13. Select the **Report Manager** link. For more information, please refer to the <u>Report Manager</u> steps for further instructions.
- 14. On the Report Manager page, select the **Administration** tab.
- 15. In the **Description** column select the **PO Activity** link of specific Process Instance number to view the Report ID POP0009 pdf.



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The pdf report opens in a new window. Note the entered date range will determine the number of page data results.



#### 16. Process complete.

### **Video Tutorial**

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

## **Video Tutorial Via Panopto**

View the link to Creating a PO Activity Report. This link will open in a new tab/window.