

## 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:

- [User Preferences: Purchase Order Entry](#)
- [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.

💡 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

1. 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 [Run Control IDs](#) 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**.

**Purchase Order Activity**

Run Control ID WA040\_PO\_ACTIVITY      Report Manager    Process Monitor   

Language

**Report Request Parameters**

Business Unit

GL Business Unit

Department

☐ Include Cancelled POs?

☐ Include Open/Pending Appr POs?

**From Date**

Option        Nbr Days       Date

**Through Date**

Option        Nbr Days       Date

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.

**Purchase Order Activity**

Run Control ID: WA040\_PO\_ACTIVITY      Report Manager    Process Monitor    Run

Language: English

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**Report Request Parameters**

Business Unit: WA120    GL Business Unit: WA120    ☐ Include Cancelled POs?

Department:    ☐ Include Open/Pending Appr POs?

**From Date**

Option: S    Nbr Days:    Date: 09/01/2023

**Through Date**

Option: S    Nbr Days:    Date: 10/25/2023

Save    Notify    Refresh    Add    Update/Display

**Look Up Option**

Select one of the following values:

C	Current Date
M	Current Date Minus Days
N	No Selection by Date
P	Current Date Plus Days
S	Specified Date

Cancel

10. The **Process Scheduler Request** window opens. Select the **OK** button. Please refer to the [Process Schedule Request](#) steps for further instructions.
11. The **Purchase Order Activity** page redisplay.
12. Select the **Process Monitor** link. For more information, please refer to QRG [Process Scheduler/Process Monitor](#).
13. Select the **Report Manager** link. For more information, please refer to the [Report Manager](#) 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.

Activity

Report Manager

List

Explorer

Administration

Archives

View Reports For

User ID

5352

Type

Last

1

Days

Refresh

Status

Folder

Instance

to

Report List

1-2 of 2

View All

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	3723631	4077934	PO Activity	10/25/2023 12:47:54PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	3723622	4077919	Comm. Cntrl. Budget Processor	10/25/2023 11:59:11AM	Text Files (*.txt)	Posted	Details

☒ Select All

☐ Deselect All

Delete

Click the delete button to delete the selected report(s)

Go back to PO Activity

Save


List

Explorer

Administration

Archives

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

Report ID: POP0009		PeopleSoft Financials PURCHASE ORDER ACTIVITY REPORT				Page 1 of 53 Run Date 10/25/2023 Run Time 12:48:08					
PO Business Unit : WA120--CENTRALIA COLLEGE		 PO Create Dates Included : 09/01/2023 Thru 10/25/2023 Include Cancelled POs : N Include Open/Pending Approval POs : N									
GL Business Unit : WA120--CENTRALIA COLLEGE											
Department 11300--INSTRUCTION SUPPORT											
Create Dt/ Status	Due Dt	Supplier/ Buyer	PO ID/ Line/Schd	Category/ Descr	Mfg Item Id/ Manufacturer	Item Id/ Descr	Order Qty	Price	UOM	Extended Price	Curr
09/05/2023	09/05/2023	US Bank National									
Dispatched		Assn 1010	0000005701 1/1	425		HERCULES Series 770 1b. Capacity Black Stack Chair with Lumbar Support and	30.00		46.49 EA	1,394.70	USD
				Furniture: Office							
Total for INSTRUCTION SUPPORT Department										1,394.70	USD

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.