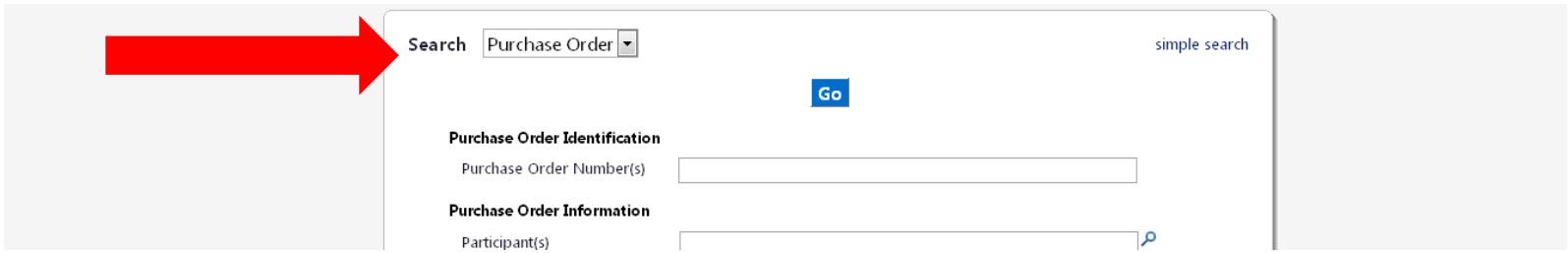
GATEWAY REPORT GUIDE

Reports to Consider for Your Department

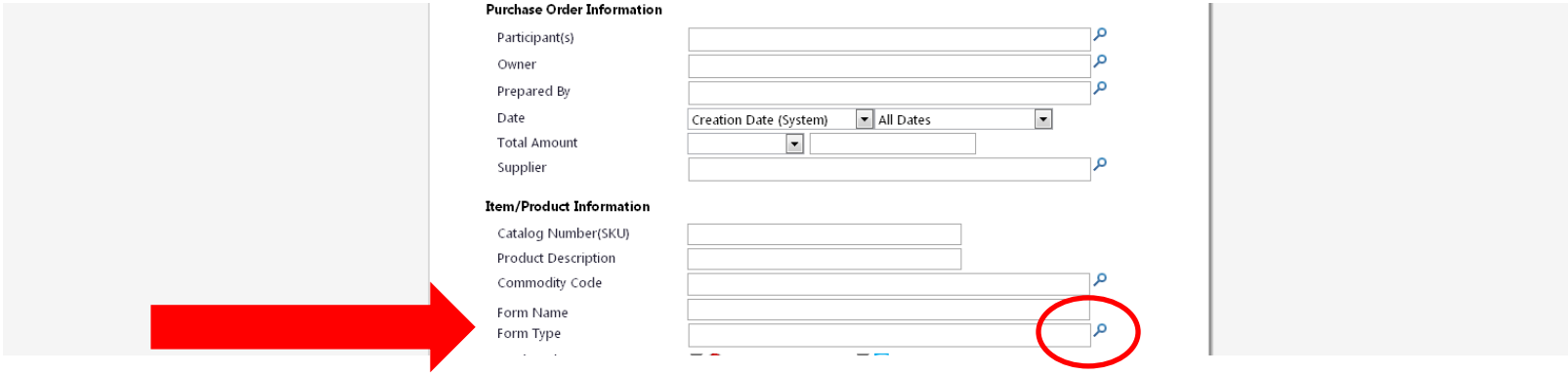
- There are a few reports that we recommend setting up in your department and running periodically to get a better picture of the receiving needs of your department.
- These reports are:
    1. All of the Vendor Blankets in your department
    2. All of the Purchase Orders in your department that do not show any receiving
    3. All of the Purchase Orders in your department that show partial receiving
    4. All of the Invoices for your department
- These reports are easy to set up, save to your profile and re-run again and again at any time that you need order status snapshots.
    - You can also request using the Helpdesk to create a shared folder for your department, so that many individuals can access any of the reports at any time.

1. Vendor Blanket Report

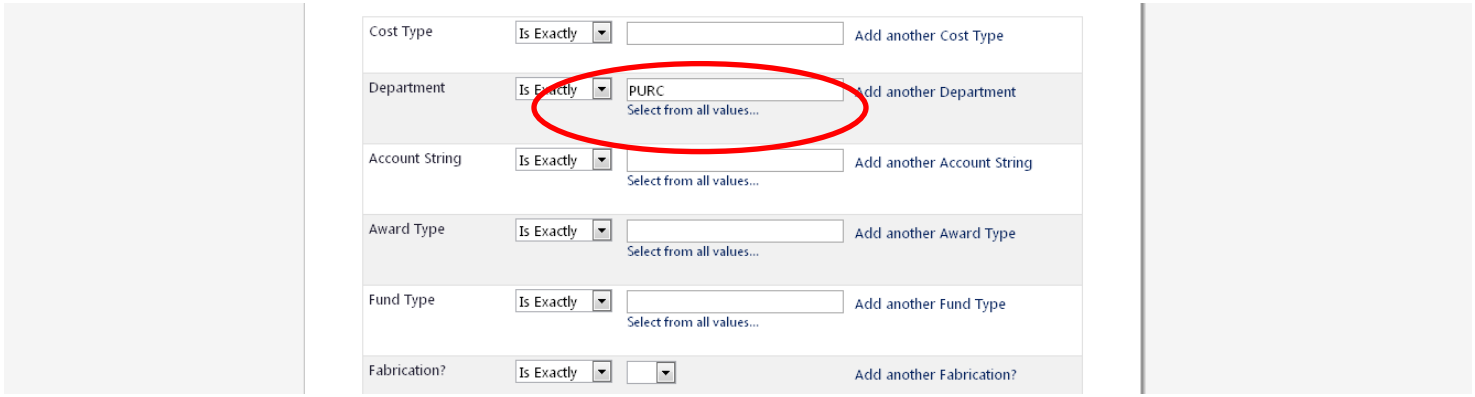
- This report is great to run to keep up with all of your department's current Vendor Blankets. You can easily see in one report all of the Vendor Blankets and their status.
- To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the "Advanced Search" link to bring you out of "Simple Search")
- Make sure that you have selected "Purchase Order" from the drop down menu at the top.



- Scroll down slightly until you see the “Form Type” field. Click the spyglass on the right hand side and select “Vendor Blanket” from the options. Click “Add”.

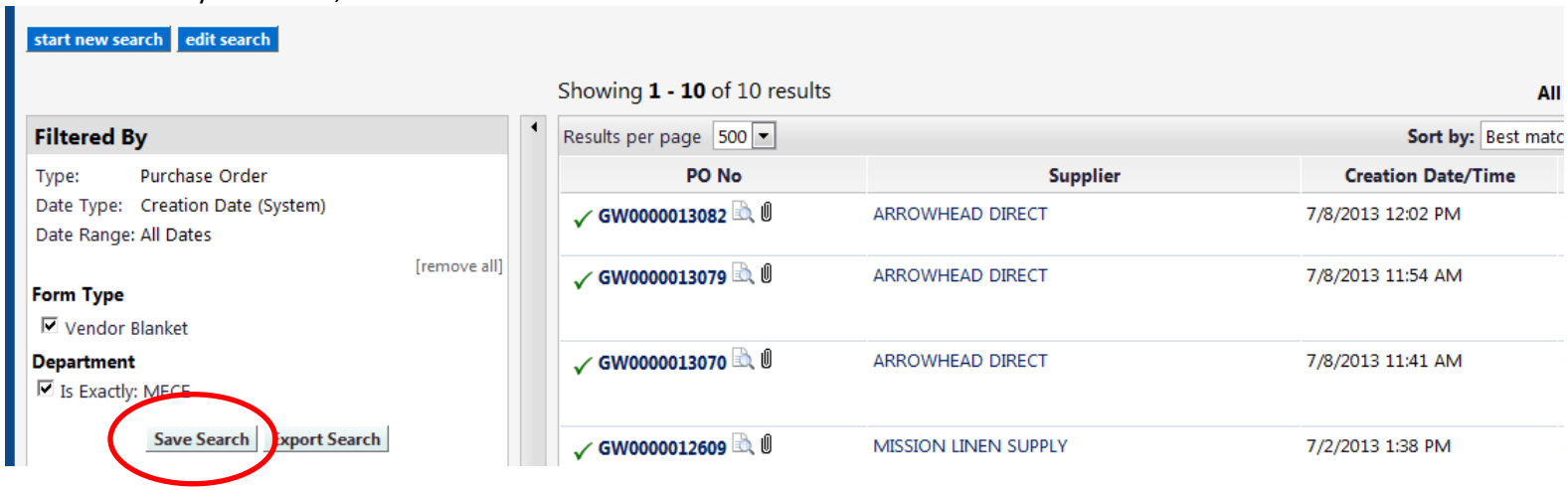


- Finally, scroll all the way to the bottom and enter in your 4-digit department code.
    - If you have more than one department code, you may add more by clicking “Add another Department” at the right.



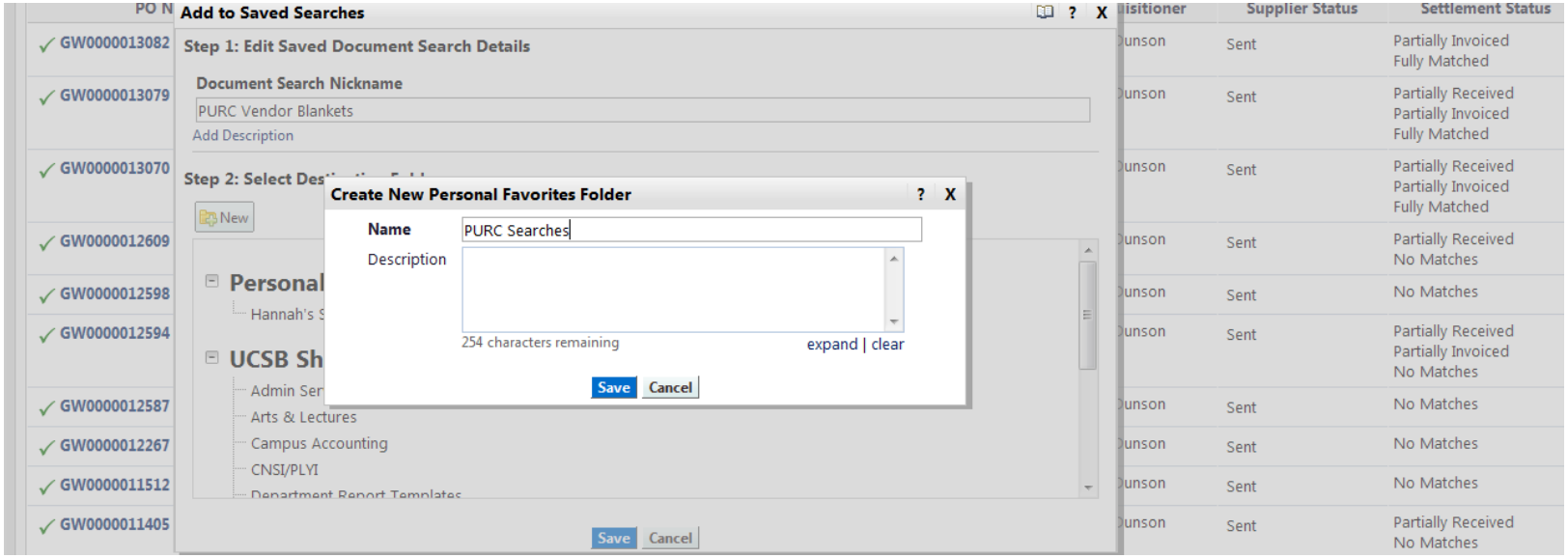
- Then hit Go!

- To save your search, click “save search” from the menu on the left hand side of the screen.



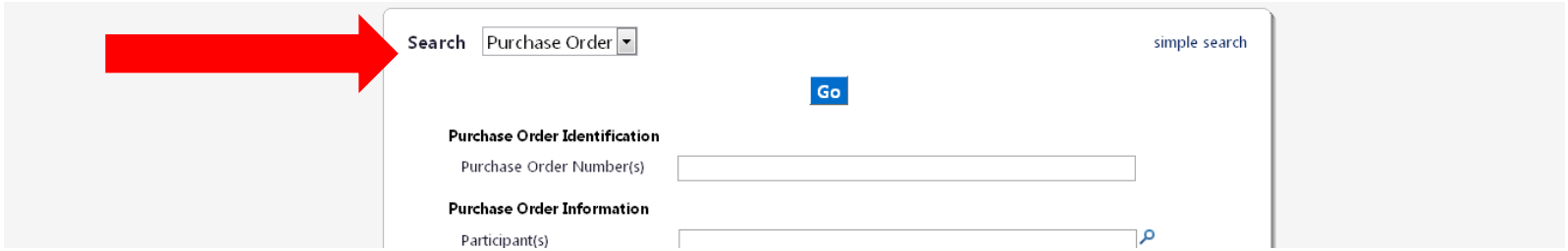
- Give your saved search a name; one that clearly describes the parameters of your search.

- Then either select a current folder to save your search in or create a new “Top level personal folder” to save the search in. Then hit save!



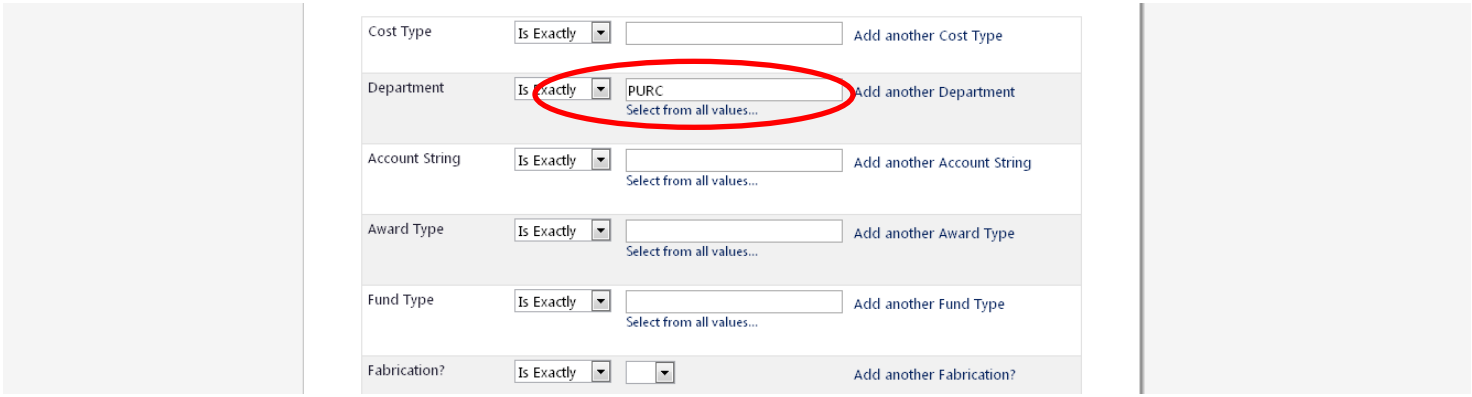
2. Report – Purchase Orders with No Receiving

- This report is great to run to keep up with all of your department's current Purchase Orders that do not show any receiving.
- To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the "Advanced Search" link to bring you out of "Simple Search")
- Make sure that you have selected "Purchase Order" from the drop down menu at the top.

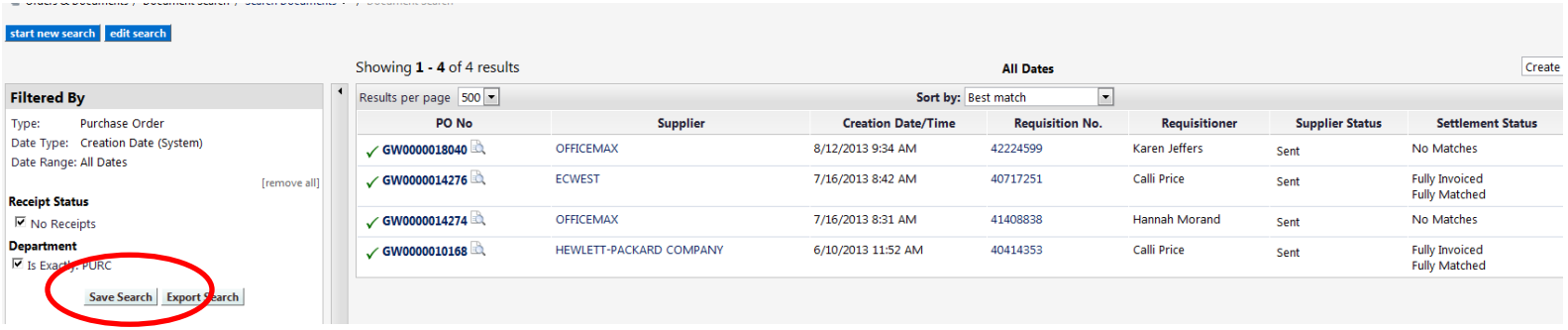


- Scroll about half way down the page and select "No Receipts" from the "Receipt Status" section.

- Then continue to scroll down the page and enter in your 4-digit department code in the Custom Fields section.



- Then hit go!
- To save your search, click “save search” from the menu on the left hand side of the screen.



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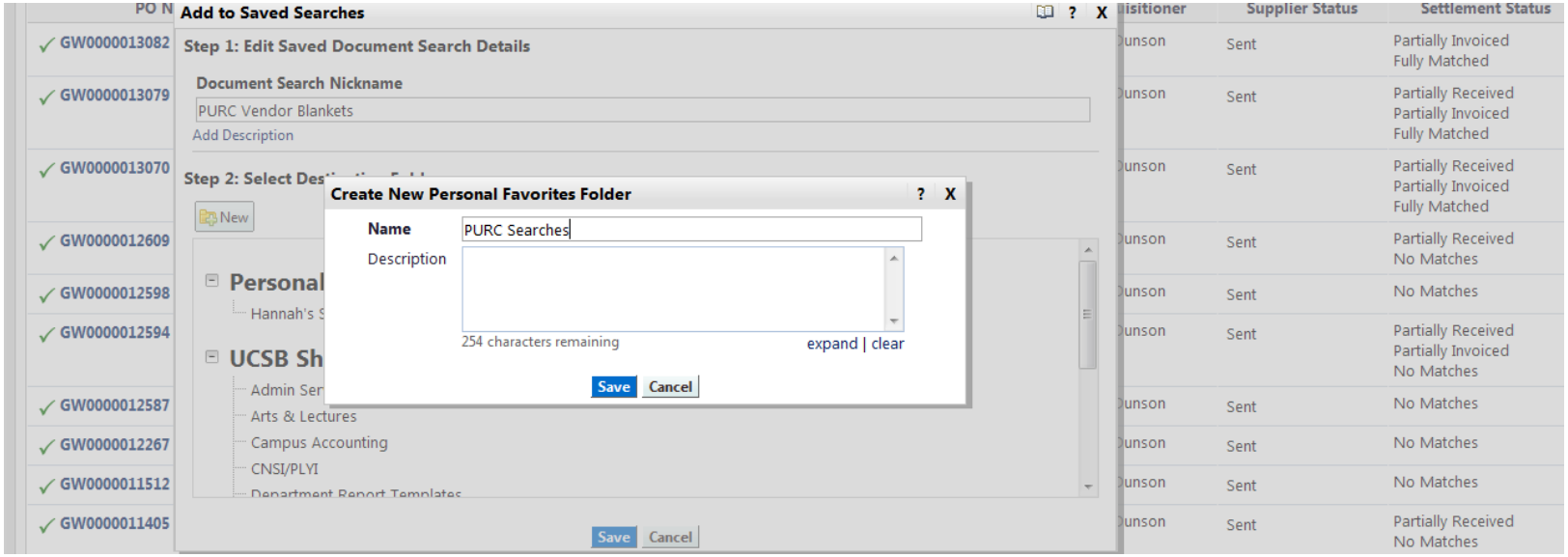
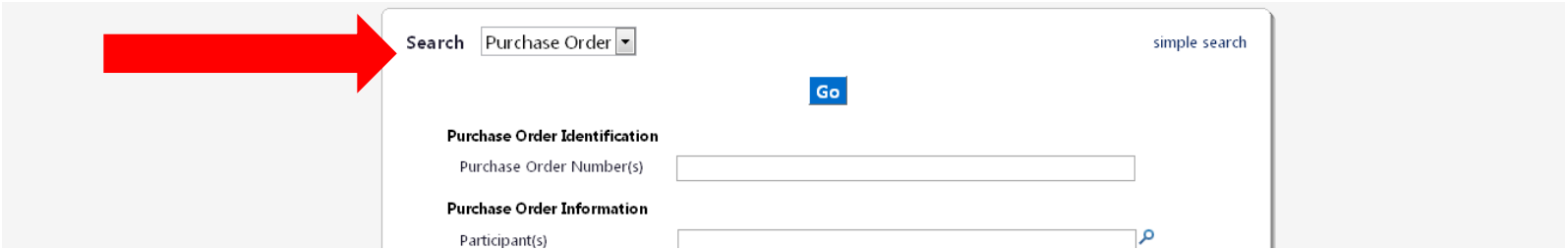
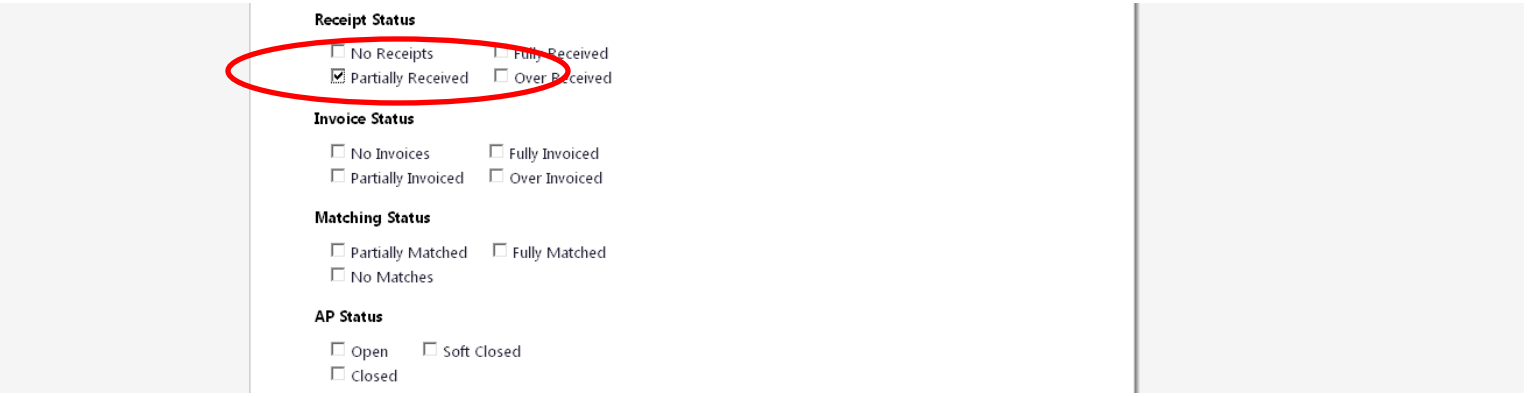


3. Report – Purchase Orders with Partial Receiving

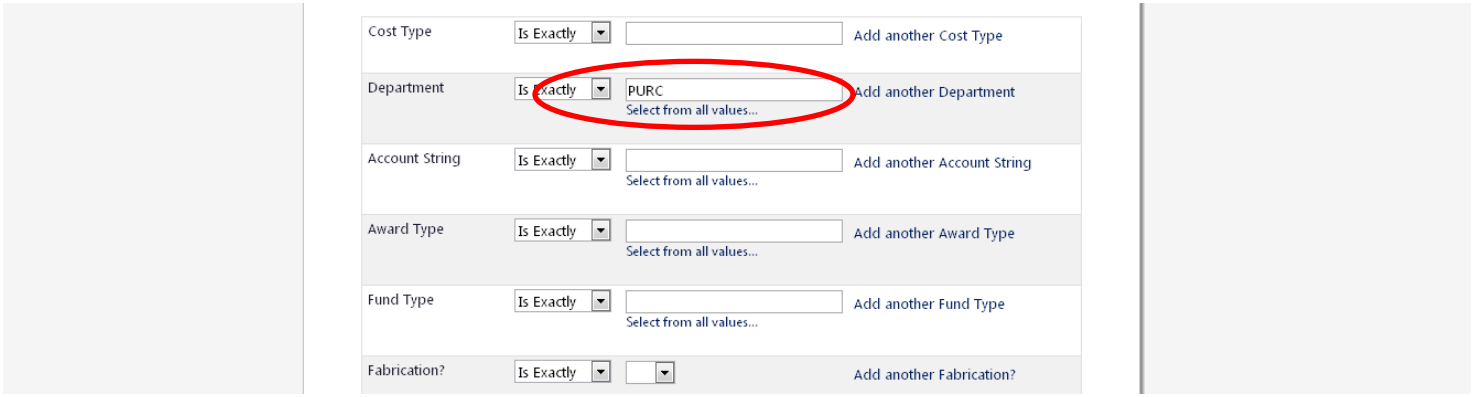
- This report is great to run to keep up with all of your department’s current Purchase Orders that show some receiving and need to be completed.
- To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the “Advanced Search” link to bring you out of “Simple Search”)
- Make sure that you have selected “Purchase Order” from the drop down menu at the top.



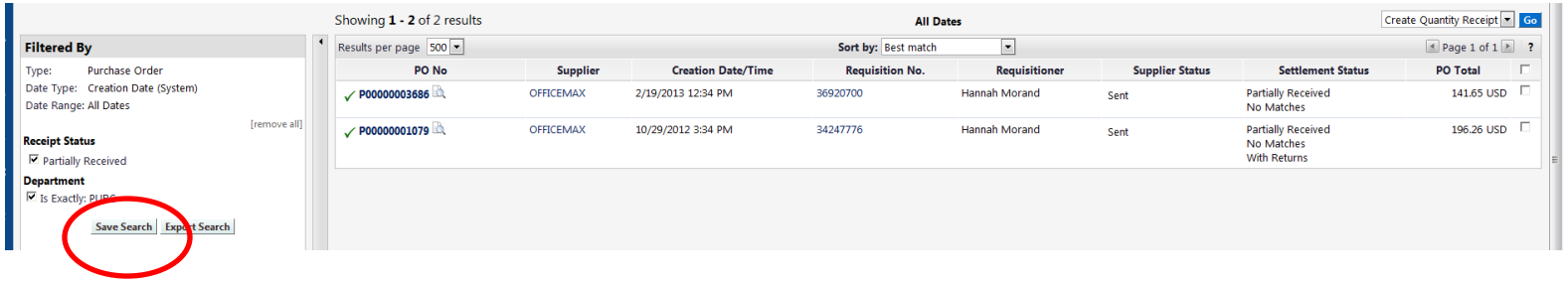
- Scroll about half way down the page and select “Partially Received” from the “Receipt Status” section.



- Then continue to scroll down the page and enter in your 4-digit department code in the Custom Fields section.

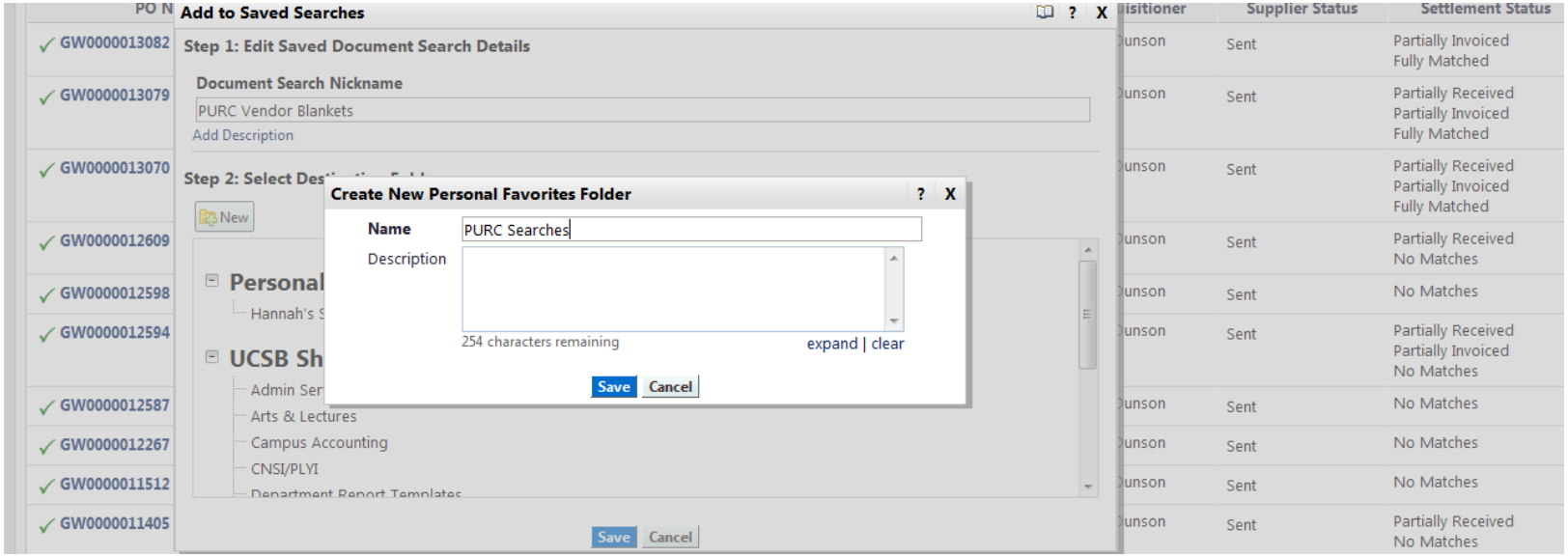


- Then hit go!
- To save your search, click “save search” from the menu on the left hand side of the screen.



- Give your saved search a name; one that clearly describes the parameters of your report.

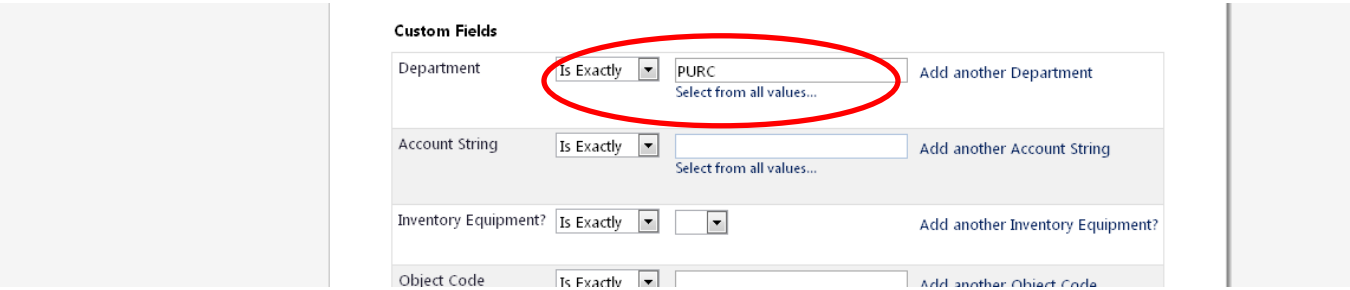
- Then either select a current folder to save your search in or create a new "Top level personal folder" to save the search in. Then hit save!



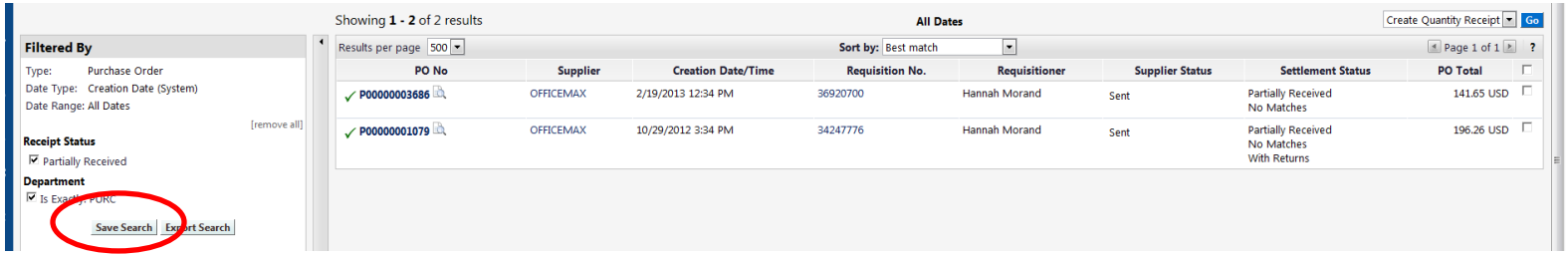
4. Invoice Report

- This report is great to run to keep up with all of your department's Invoices.
- To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the "Advanced Search" link to bring you out of "Simple Search")
- Make sure that you have selected "Invoices" from the drop down menu at the top.

- Then continue to scroll down the page and enter in your 4-digit department code in the Custom Fields section.



- If you would like to narrow your search to invoices that have completed the Accounts Receivable process, go to “Payment Status” and select both “Paid” and “Payable” – this way items in process will not be displayed.
- Then hit go!
- To save your search, click “save search” from the menu on the left hand side of the screen.



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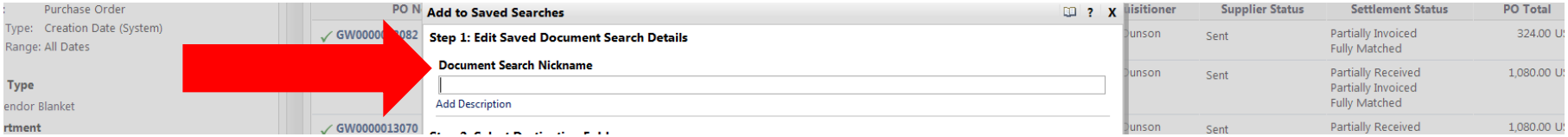

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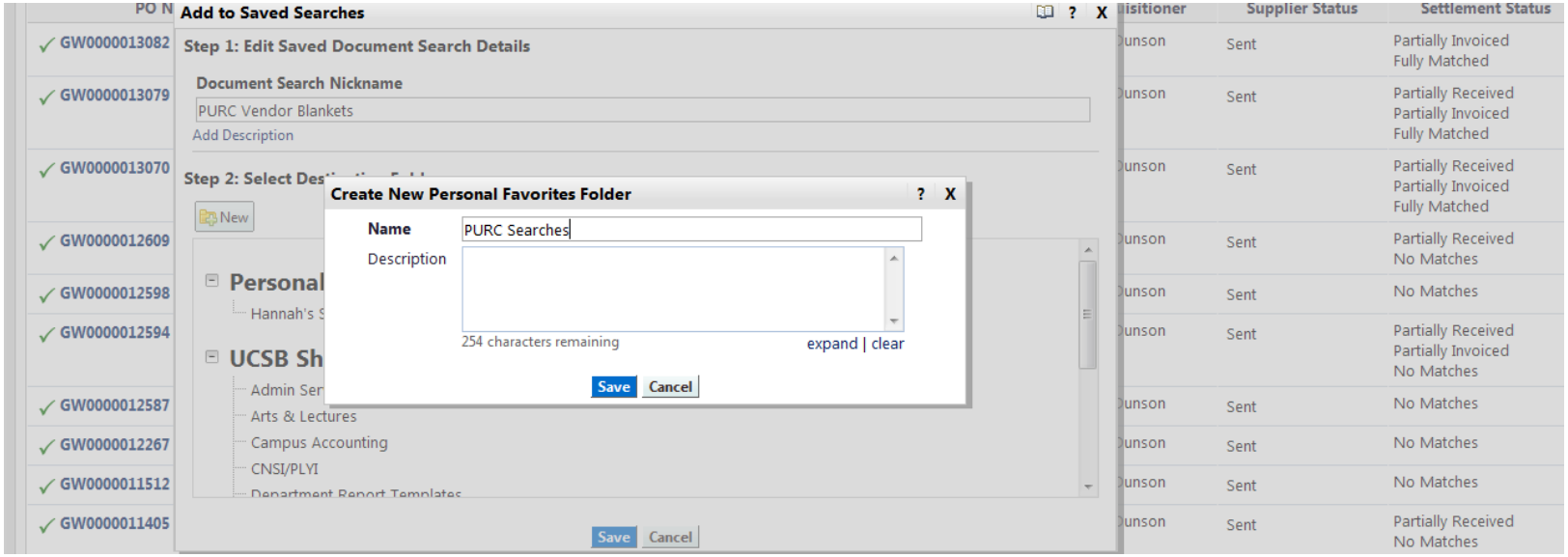
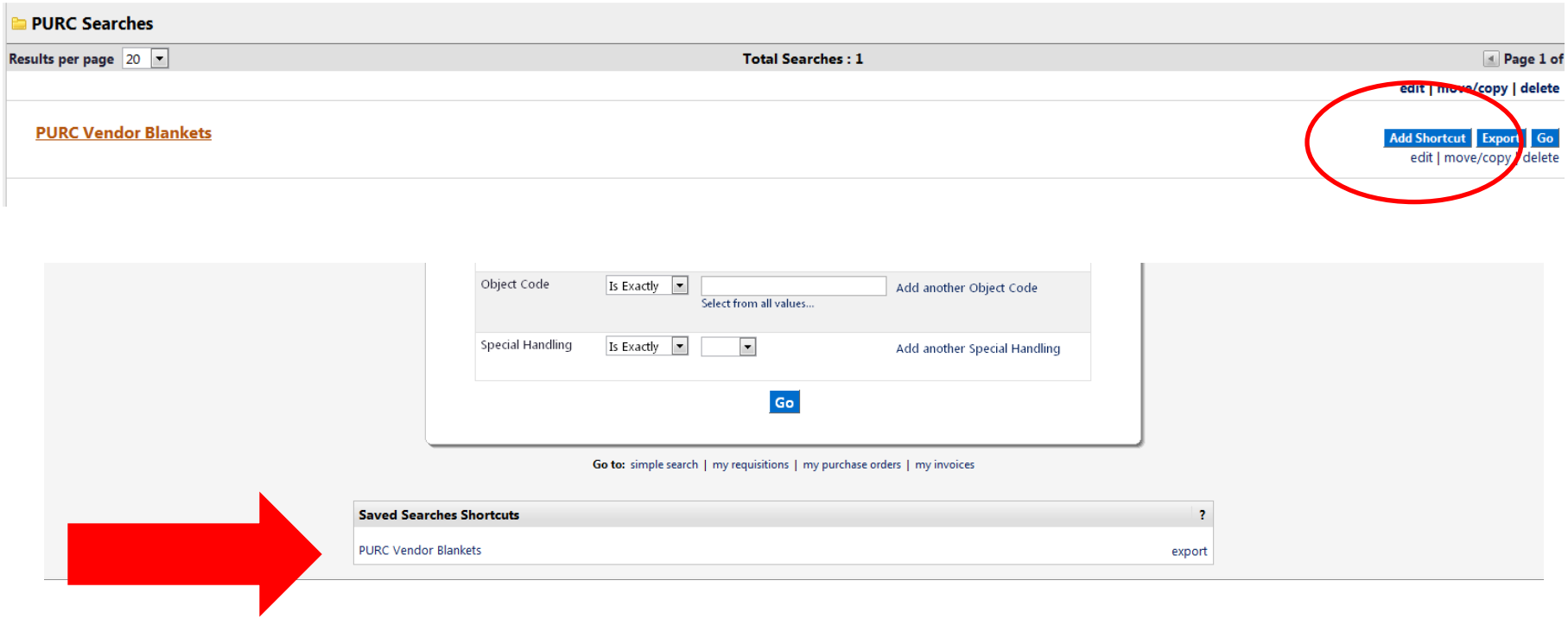


Accessing Your Saved Searches

- In both the Classic and Phoenix Interfaces, your saved searches can be accessed under the “Document Search” tab.
- By pulling up your desired folder from the Saved Searches selections, you can click on the saved search to run it at any time.

- You also have the option to “Add Shortcut”. This will put the search on the same page as your Document Search for ease of access. Next time you want to find it, just go to your Document Search tab, scroll to the bottom and you will find your search!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Results per page 20
Total Searches : 1
Page 1 of
edit | move/copy | delete
PURC Vendor Blankets
Add Shortcut
Export
Go
edit | move/copy | delete
Object Code
Is Exactly
Select from all values...
Add another Object Code
Special Handling
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Saved Searches Shortcuts
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PURC Vendor Blankets
export