

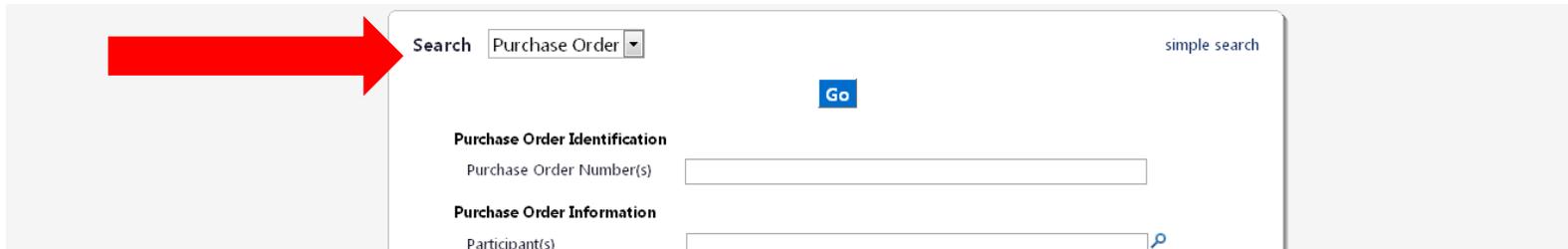
## GATEWAY REPORT GUIDE

### 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.



Search  simple search

**Purchase Order Identification**  
Purchase Order Number(s)

**Purchase Order Information**  
Participant(s)  🔍

- 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”.

**Purchase Order Information**

Participant(s)

Owner

Prepared By

Date Creation Date (System)  All Dates

Total Amount

Supplier

**Item/Product Information**

Catalog Number(SKU)

Product Description

Commodity Code

Form Name

Form Type

- 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.

Cost Type  Is Exactly  Add another Cost Type

Department  Is Exactly  PURC Add another Department  
Select from all values...

Account String  Is Exactly  Add another Account String  
Select from all values...

Award Type  Is Exactly  Add another Award Type  
Select from all values...

Fund Type  Is Exactly  Add another Fund Type  
Select from all values...

Fabrication?  Is Exactly  Add another Fabrication?

- Then hit Go!

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

Showing 1 - 10 of 10 results

Results per page: 500 | Sort by: Best match

PO No	Supplier	Creation Date/Time
✓ GW0000013082	ARROWHEAD DIRECT	7/8/2013 12:02 PM
✓ GW0000013079	ARROWHEAD DIRECT	7/8/2013 11:54 AM
✓ GW0000013070	ARROWHEAD DIRECT	7/8/2013 11:41 AM
✓ GW0000012609	MISSION LINEN SUPPLY	7/2/2013 1:38 PM

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

Document Search Nickname

Add Description

- 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!

Step 2: Select Destination Folder

Create New Personal Favorites Folder

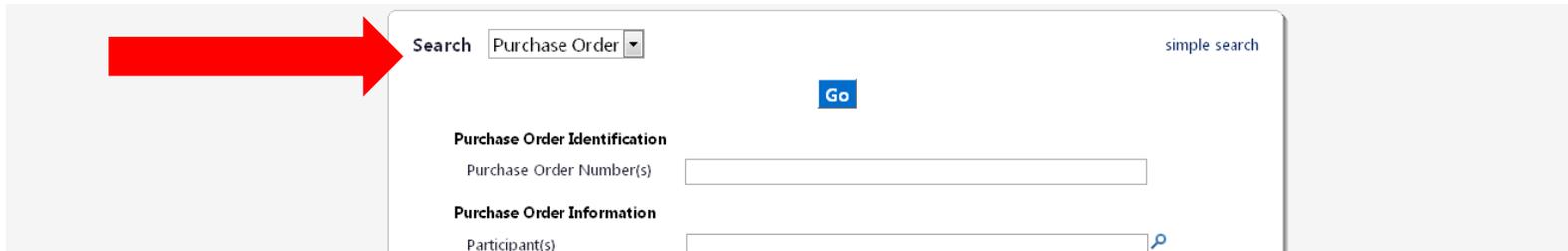
Name: PURC Searches

Description: 254 characters remaining

Save Cancel

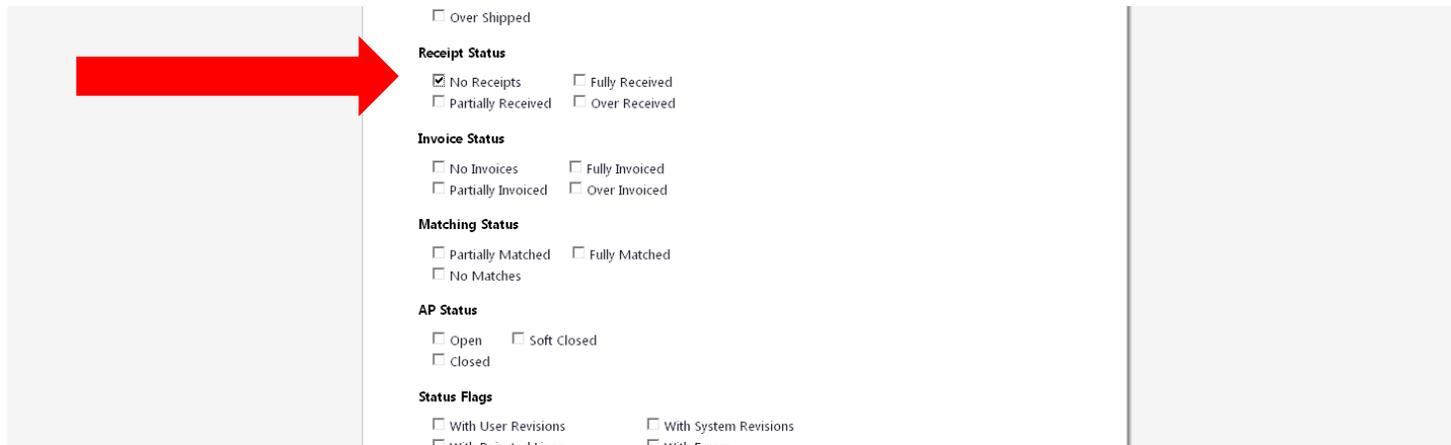
## 2. Report – Purchase Orders with No Receiving

- 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.



The screenshot shows a search interface with a dropdown menu set to "Purchase Order". A red arrow points to the dropdown menu. Below the search bar, there are two sections: "Purchase Order Identification" with a text input for "Purchase Order Number(s)" and "Purchase Order Information" with a text input for "Participant(s)". A "Go" button is located to the right of the search bar.

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



The screenshot shows a list of filter options. A red arrow points to the "No Receipts" checkbox under the "Receipt Status" section. The filter options include:

- Over Shipped
- Receipt Status**
  - No Receipts
  - Partially Received
  - Fully Received
  - Over Received
- Invoice Status**
  - No Invoices
  - Partially Invoiced
  - Fully Invoiced
  - Over Invoiced
- Matching Status**
  - Partially Matched
  - No Matches
  - Fully Matched
- AP Status**
  - Open
  - Closed
  - Soft Closed
- Status Flags**
  - With User Revisions
  - With System Revisions
  - With Deleted Lines
  - With Errors

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

Cost Type: Is Exactly [ ] Add another Cost Type

Department: Is Exactly [ PURC ] Add another Department  
Select from all values...

Account String: Is Exactly [ ] Add another Account String  
Select from all values...

Award Type: Is Exactly [ ] Add another Award Type  
Select from all values...

Fund Type: Is Exactly [ ] Add another Fund Type  
Select from all values...

Fabrication?: Is Exactly [ ] Add another Fabrication?

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

Showing 1 - 4 of 4 results

Results per page: 500 | Sort by: Best match

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status
GW0000018040	OFFICEMAX	8/12/2013 9:34 AM	42224599	Karen Jeffers	Sent	No Matches
GW0000014276	ECWEST	7/16/2013 8:42 AM	40717251	Calli Price	Sent	Fully Invoiced Fully Matched
GW0000014274	OFFICEMAX	7/16/2013 8:31 AM	41408838	Hannah Morand	Sent	No Matches
GW0000010168	HEWLETT-PACKARD COMPANY	6/10/2013 11:52 AM	40414353	Calli Price	Sent	Fully Invoiced Fully Matched

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

**Add to Saved Searches**

Step 1: Edit Saved Document Search Details

Document Search Nickname: [ ]

Add Description: [ ]

Requisitioner	Supplier Status	Settlement Status	PO Total
unson	Sent	Partially Invoiced Fully Matched	324.00 U
unson	Sent	Partially Received Partially Invoiced Fully Matched	1,080.00 U
unson	Sent	Partially Received	1,080.00 U

- 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!

The screenshot shows a software interface with a sidebar on the left containing a list of purchase order numbers (e.g., GW0000013082, GW0000013079, etc.). The main area is titled "Add to Saved Searches" and is in "Step 1: Edit Saved Document Search Details". A text field contains "PURC Vendor Blankets". A "Step 2: Select Destination" dialog is open, titled "Create New Personal Favorites Folder". It has a "Name" field with "PURC Searches" and a "Description" field. Below the description field, it says "254 characters remaining" and "expand | clear". There are "Save" and "Cancel" buttons at the bottom of the dialog. In the background, a table is visible with columns "Positioner", "Supplier Status", and "Settlement Status".

### 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.

The screenshot shows a search interface. At the top, there is a "Search" label followed by a dropdown menu currently set to "Purchase Order". A large red arrow points to this dropdown menu. To the right of the dropdown is a "simple search" link. Below the search bar is a blue "Go" button. Underneath, there are two sections: "Purchase Order Identification" with a text input for "Purchase Order Number(s)", and "Purchase Order Information" with a text input for "Participant(s)" and a magnifying glass icon.

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

**Receipt Status**

No Receipts     Fully Received

Partially Received     Over Received

**Invoice Status**

No Invoices     Fully Invoiced

Partially Invoiced     Over Invoiced

**Matching Status**

Partially Matched     Fully Matched

No Matches

**AP Status**

Open     Soft Closed

Closed

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

Cost Type    Is Exactly        Add another Cost Type

Department    Is Exactly        Add another Department

Account String    Is Exactly        Add another Account String

Award Type    Is Exactly        Add another Award Type

Fund Type    Is Exactly        Add another Fund Type

Fabrication?    Is Exactly        Add another Fabrication?

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

Showing 1 - 2 of 2 results    All Dates    Create Quantity Receipt    Go

Results per page: 500    Sort by: Best match    Page 1 of 1    ?

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
✓ P0000003686	OFFICEMAX	2/19/2013 12:34 PM	36920700	Hannah Morand	Sent	Partially Received No Matches	141.65 USD
✓ P0000001079	OFFICEMAX	10/29/2012 3:34 PM	34247776	Hannah Morand	Sent	Partially Received No Matches With Returns	196.26 USD

**Filtered By**

Type: Purchase Order

Date Type: Creation Date (System)

Date Range: All Dates    [remove all]

**Receipt Status**

Partially Received

**Department**

Is Exactly: PURC

[Save Search](#)    [Export Search](#)

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

The screenshot shows the 'Add to Saved Searches' dialog box with 'Step 1: Edit Saved Document Search Details'. The 'Document Search Nickname' field is highlighted with a red arrow. The background shows a table with columns: Positioner, Supplier Status, Settlement Status, and PO Total.

Positioner	Supplier Status	Settlement Status	PO Total
unson	Sent	Partially Invoiced Fully Matched	324.00 U
unson	Sent	Partially Received Partially Invoiced Fully Matched	1,080.00 U
unson	Sent	Partially Received	1,080.00 U

- 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!

The screenshot shows the 'Add to Saved Searches' dialog box with 'Step 2: Select Destination Folder'. A 'Create New Personal Favorites Folder' dialog box is open, showing 'Name' as 'PURC Searches' and 'Description' as an empty field. The background shows a tree view of folders under 'Personal' and 'UCSB Sh'.

#### 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.

The screenshot shows the 'Simple Search' interface. The 'Search' dropdown menu is set to 'Invoice'. A red arrow points to the dropdown. Below the dropdown is a 'Go' button and an 'Invoice Identification' section with an 'Invoice Number(s)' input field.

- 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.

Showing 1 - 2 of 2 results

All Dates

Results per page: 500

Sort by: Best match

Page 1 of 1

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
✓ P00000003686	OFFICEMAX	2/19/2013 12:34 PM	36920700	Hannah Morand	Sent	Partially Received No Matches	141.65 USD
✓ P0000001079	OFFICEMAX	10/29/2012 3:34 PM	34247776	Hannah Morand	Sent	Partially Received No Matches With Returns	196.26 USD

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

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Document Search Nickname

Add Description

Requisitioner	Supplier Status	Settlement Status	PO Total
unson	Sent	Partially Invoiced Fully Matched	324.00 U
unson	Sent	Partially Received Partially Invoiced Fully Matched	1,080.00 U
unson	Sent	Partially Received	1,080.00 U

- 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!

**Add to Saved Searches**

Step 1: Edit Saved Document Search Details

Document Search Nickname: PURC Vendor Blankets

Step 2: Select Destination Folder

**Create New Personal Favorites Folder**

Name: PURC Searches

Description: [Empty text area]

254 characters remaining

Save Cancel

Positioner	Supplier Status	Settlement Status
unson	Sent	Partially Invoiced Fully Matched
unson	Sent	Partially Received Partially Invoiced Fully Matched
unson	Sent	Partially Received Partially Invoiced Fully Matched
unson	Sent	Partially Received No Matches
unson	Sent	No Matches
unson	Sent	Partially Received Partially Invoiced No Matches
unson	Sent	No Matches
unson	Sent	No Matches
unson	Sent	No Matches
unson	Sent	Partially Received No Matches

### 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.

**PURC Searches**

Results per page: 20 Total Searches: 1 Page 1 of 1

[PURC Vendor Blankets](#)

Add Shortcut Export Go

- 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!

PURC Searches

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  Add another Object Code  
Select from all values...

Special Handling  Is Exactly  Add another Special Handling

Go

Go to: simple search | my requisitions | my purchase orders | my invoices

Saved Searches Shortcuts

PURC Vendor Blankets

export

