

## 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 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.

The screenshot shows a search interface with the following elements:

- A search bar with a dropdown menu currently set to "Purchase Order".
- A "simple search" link in the top right corner.
- A blue "Go" button centered below the search bar.
- A section titled "Purchase Order Identification" containing a text input field for "Purchase Order Number(s)".
- A section titled "Purchase Order Information" containing a text input field for "Participant(s)" with a magnifying glass icon to its right.

- 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.

start new search edit search

Showing 1 - 10 of 10 results All

**Filtered By**

Type: Purchase Order  
 Date Type: Creation Date (System)  
 Date Range: All Dates [remove all]

**Form Type**

Vendor Blanket

**Department**

Is Exactly: MECE

Save Search Export Search

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.

Purchase Order PO N Add to Saved Searches

Type: Creation Date (System)  
 Range: All Dates

Type  
 Vendor Blanket  
 Department

GW0000013082  
 GW0000013070

Step 1: Edit Saved Document Search Details

Document Search Nickname

Add Description

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 a software interface with a dialog box titled "Create New Personal Favorites Folder". The dialog has a "Name" field containing "PURC Searches" and a "Description" field which is empty. 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 for "Positioner", "Supplier Status", and "Settlement Status".

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

**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. At the top, there is a "Search" dropdown menu set to "Purchase Order" and a "simple search" link. Below this is a blue "Go" button. Underneath, there are two sections: "Purchase Order Identification" with a "Purchase Order Number(s)" input field, and "Purchase Order Information" with a "Participant(s)" input field and a magnifying glass icon.

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

Over Shipped  
**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  
**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	<input type="text"/>	Add another Cost Type
Department	Is Exactly	<input type="text" value="PURC"/> <small>Select from all values...</small>	Add another Department
Account String	Is Exactly	<input type="text"/>	Add another Account String
Award Type	Is Exactly	<input type="text"/>	Add another Award Type
Fund Type	Is Exactly	<input type="text"/>	Add another Fund Type
Fabrication?	Is Exactly	<input type="text"/>	Add another Fabrication?

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

start new search | edit search

Showing 1 - 4 of 4 results All Dates Create

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

**Filtered By**

Type: Purchase Order  
 Date Type: Creation Date (System)  
 Date Range: All Dates [remove all]

**Receipt Status**  
 No Receipts

**Department**  
 Is Exactly: PURC

Save Search Export Search

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

Purchase Order

Type: Creation Date (System)  
 Range: All Dates

Type  
 Vendor: Blanket  
 Department

PO No: ✓ GW0000013082

**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!

Disitioner	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	No Matches
unson	Sent	Partially Received No Matches

### 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.

**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	<input type="text"/>	Add another Cost Type
Department	Is Exactly	PURC <small>Select from all values...</small>	Add another Department
Account String	Is Exactly	<input type="text"/> <small>Select from all values...</small>	Add another Account String
Award Type	Is Exactly	<input type="text"/> <small>Select from all values...</small>	Add another Award Type
Fund Type	Is Exactly	<input type="text"/> <small>Select from all values...</small>	Add another Fund Type
Fabrication?	Is Exactly	<input type="text"/>	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 that describes the parameters of your report.

Purchase Order  
 Type: Creation Date (System)  
 Range: All Dates [remove all]

Type  
 Vendor Blanket  
 Department

**Add to Saved Searches** ? X

**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** ? X

**Step 1: Edit Saved Document Search Details**

**Document Search Nickname**  
  
 Add Description

**Step 2: Select Destination Folder**

Personal  
 Hannah's S

UCSB Sh  
 Admin Ser  
 Arts & Lectures  
 Campus Accounting  
 CNSI/PLYI  
 Department Report Templates

**Create New Personal Favorites Folder** ? X

Name   
 Description   
 254 characters remaining expand | clear

Requisitioner	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 Fully Matched
unson	Sent	No Matches
unson	Sent	No Matches
unson	Sent	No Matches
unson	Sent	No Matches
unson	Sent	Partially Received No Matches

#### 4. Invoice Report

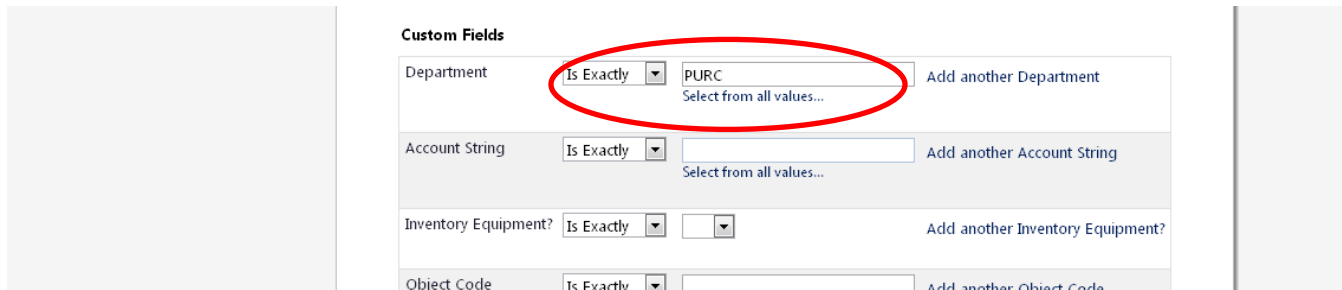
- This report is great to run to keep up with all of your department’s Invoices.
- To run the report, start from Document Search > Advanced Search. (If you do not see Advanced Search, you should be able to click the “Advanced Search” link to bring you out of “Simple Search”)
- Make sure that you have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



The screenshot shows a search interface. At the top left, there is a 'Search' label followed by a dropdown menu currently set to 'Invoice'. To the right of this is a 'simple search' link. Below the dropdown is a blue 'Go' button. Underneath the 'Go' button is the section 'Invoice Identification', which contains a text input field labeled 'Invoice Number(s)'.

•Then continue to scroll down

the page and enter in your 4-digit department code in the Custom Fields section.



The screenshot shows the 'Custom Fields' section of the search interface. It contains several rows of search criteria. The first row is for 'Department', with a dropdown set to 'Is Exactly' and a text input field containing 'PURC'. This row is circled in red. To the right of the input field is a link that says 'Add another Department'. Below this are other rows for 'Account String', 'Inventory Equipment?', and 'Object Code', each with a dropdown set to 'Is Exactly' and an empty text input field, followed by 'Add another' links.

- 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 Create Quantity Receipt

Results per page: 500 Sort by: Best match

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
✓ P00000001079	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

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

Purchase Order

Type: Creation Date (System)  
Range: All Dates

Type  
Vendor Blanket  
Department

**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  
Add Description

**Step 2: Select Destination Folder**

**Create New Personal Favorites Folder**

Name: PURC Searches  
Description:   
254 characters remaining expand | clear

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	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.

New Edit Move/Copy Delete

(+) expand all (-) collapse all

**PURC Searches**

Results per page 20 Total Searches : 1 Page 1 of

edit | move/copy | delete

**Personal**

- Hannah's Searches
  - PURC Searches**

**UCSB Shared Favorites**

**PURC Vendor Blankets** ←

Add Shortcut Export Go  
edit | move/copy | delete

- 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

