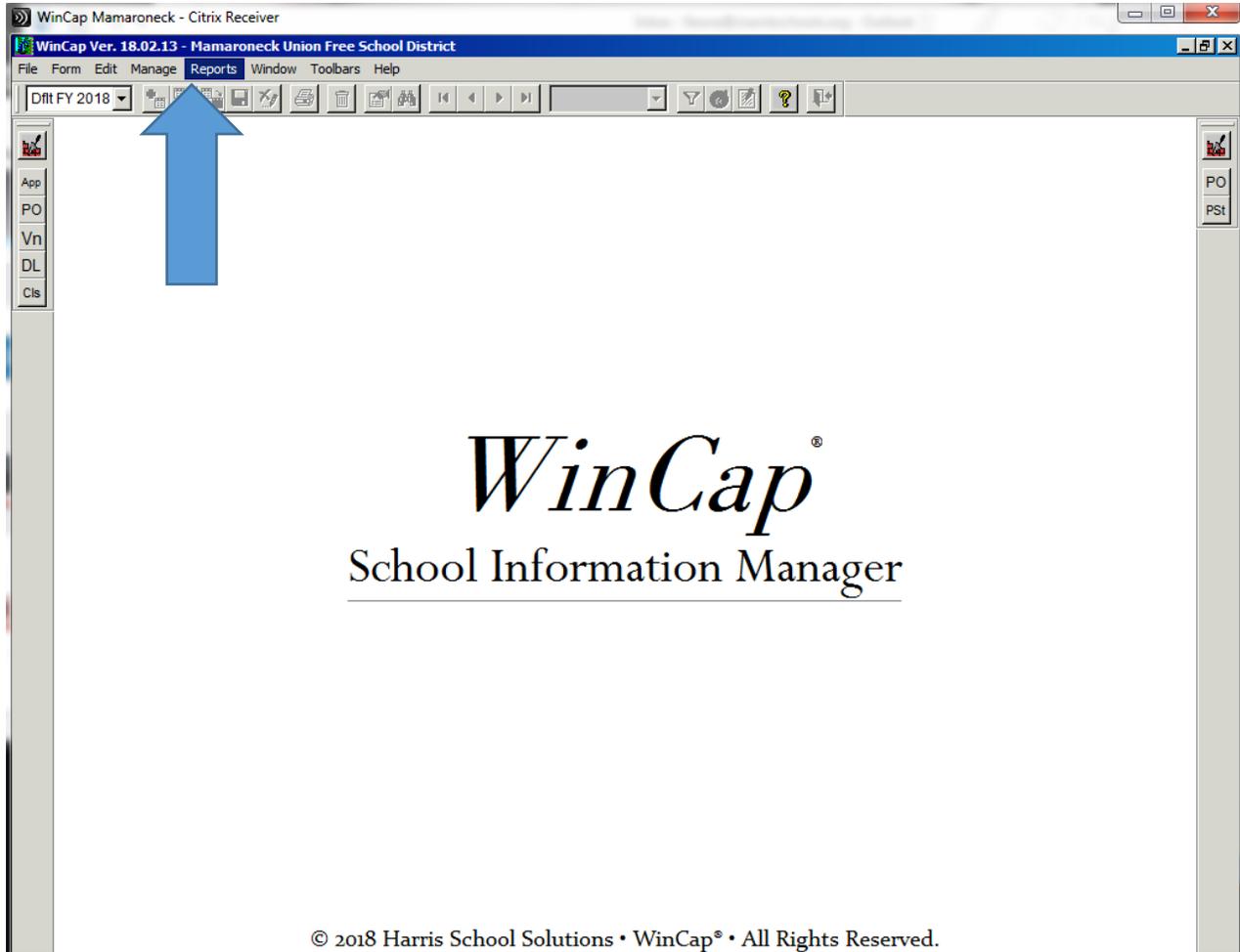


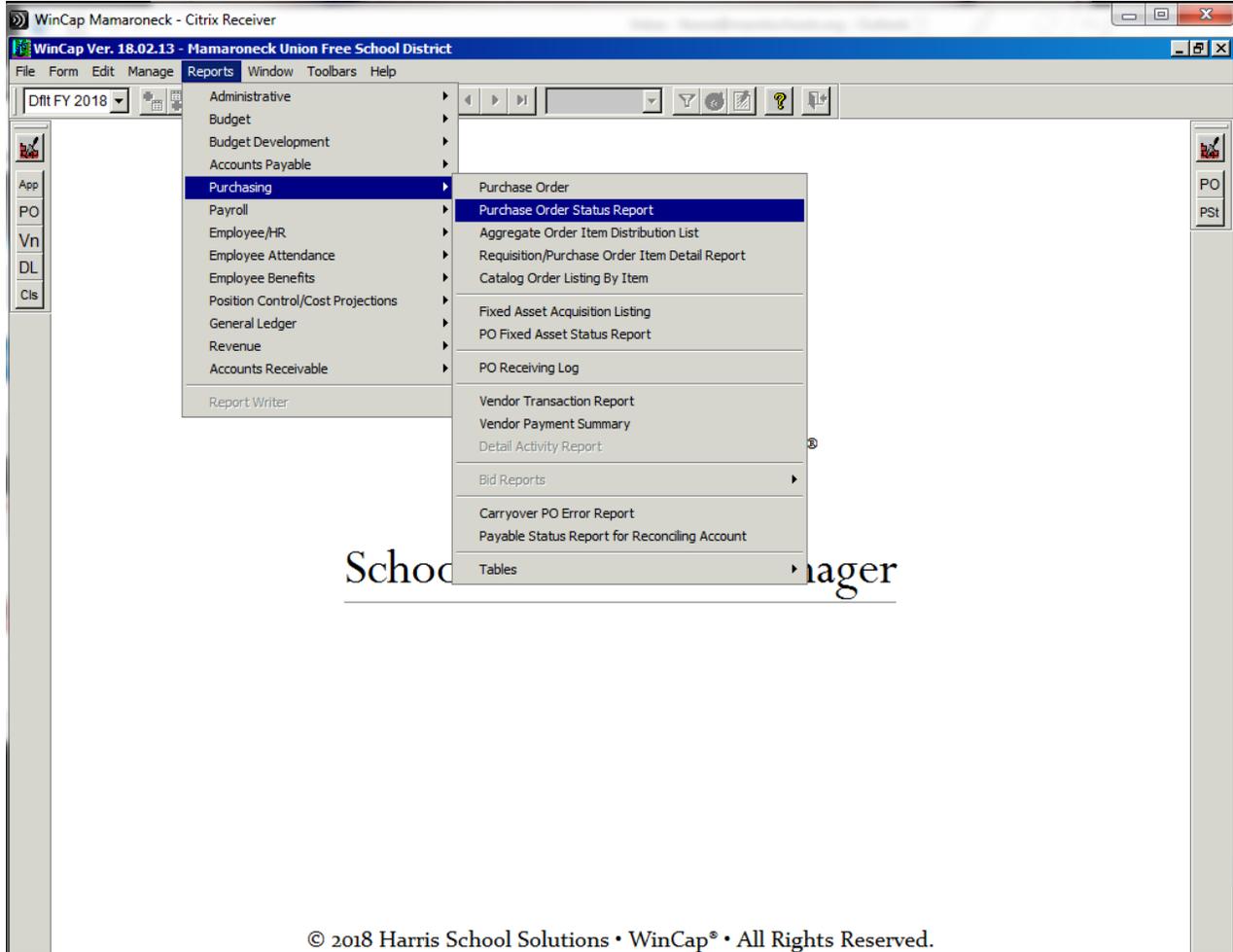
## Purchase Order Status Report in WinCap

\*\*\*This report may be run in lieu of keeping "End User" copies of PO's for reference.\*\*\*

Click on "Reports" Option in top tool bar.



Chose "Purchasing" and then "Purchase Order Status Report"



There are MANY ways to run this report. The following are simple instructions for basic reporting.

You will need to populate the following depending on how you want to run the report:

1 - Document ID#: to enquire about a specific PO or range of PO #'s.

2 - Order/Issue Date: to see a particular time period

3- Pending Orders: If you want to see the status of what you have pending as well as the status of your PO's, choose "All" in the drop down. If you ONLY want to see Processed PO's choose "None".

4 – Issued Orders: This is where you can chose to see the status of the PO. You can chose "All" in the drop down which will bring up open and closed PO's for the report range you are looking for. For an open order report only chose "Open" in the drop down.

\*\*\*For simple reporting you do not need to populate the 6 fields to the right (Vendor, Requestor, Location, Department, End User or Catalog/Bid ID)\*\*\*

5 – Check the "Show Budget Codes" and "Show Status" boxes

6 – Click on looking glass and chose "A" for your Fund in the Document Detail.

7 – Leave Sort Options at "None"

The screenshot shows the 'Purchase Order Status Report Selection' dialog box. It has a blue title bar and a grey background. The 'Record selection' section includes a 'Fiscal Year' dropdown set to '2018' and a 'Criteria Name' field with 'Last Run'. Below this are two columns of search criteria. The left column has 'Document ID' with 'From' and 'To' text boxes (callout 1) and 'Order/Issue Date' with 'From' and 'To' date pickers (callout 2). The right column has 'Pending Orders' and 'Issued Orders' dropdowns (callout 3 and 4), and six search fields for 'Vendor', 'Requestor', 'Location', 'Department', 'End User', and 'Catalog/Bid ID', each with a magnifying glass icon and the word 'Blank' (callout 10). A 'Where' field is at the bottom of this section. The bottom section contains checkboxes for 'Show Budget Codes' (checked, callout 5), 'Vendor Summary', 'Break/Total', 'Show Status' (checked, callout 9), and 'Include Moved Items'. To the right are 'Sort options' dropdowns for 'Primary' and 'Secondary', both set to 'None' (callout 7). The 'Document Detail' section has a 'Fund' dropdown set to 'A' with a magnifying glass icon (callout 6) and a 'Budget Code' field with a magnifying glass icon (callout 8). At the bottom is a 'Crystal: <default report>' dropdown (callout 8) and a toolbar with icons for search, print, and other functions, along with 'Print Settings' and 'Cancel' buttons (callout 10).

8 – If you want to run a report on all PO's within a specific Budget Code, enter the entire code in the Document Detail. If you want to run all PO's in all codes for your location then enter all question marks and the last two digits for your building or department.

9- Make sure "Show Status" is checked.

10- There are several output options for this reporting. To view the report click on the paper with the looking glass, to save click on the paper with the floppy disk, to email click on the envelope, to export to Excel click on the Excel icon and to print click on the printer icon

For example;

- A- To run a report showing all Pending and PO's in the Chatsworth Instructional Supplies code for this school year, select the date range and enter the full budget code 2110 501 00 05 13. (see attached Sample Report A)

**Purchase Order Status Report Selection**

Record selection

Fiscal Year: 2018      Criteria Name: Last Run

Document ID: From:      To:      Pending Orders: All      Issued Orders: All

Bid Requests Only

Vendor: Blank  
Requestor: Blank  
Location: Blank  
Department: Blank  
End User: Blank  
Catalog/Bid ID: Blank

Where:

Show Budget Codes     Vendor Summary  
 Break/Total             Show Status     Include Moved Items

Sort options  
Primary: None  
Secondary: None

Document Detail  
Fund: A      Budget Code: 2110-501-00-05-13      Budget Type:

Crystal: <default report>    Print Settings    Cancel

B -To run a report showing all Pendings and PO's in all codes for Chatsworth School, enter question marks and the last two digits of the Building Budget Codes ????? ??? ?? ?? 13. (see attached Sample Report B)

**Purchase Order Status Report Selection**

Record selection

Fiscal Year: 2018      Criteria Name: Last Run

Document ID: From:      To:      Pending Orders: All      Issued Orders: All

Bid Requests Only

Vendor: Blank  
Requestor: Blank  
Location: Blank  
Department: Blank  
End User: Blank  
Catalog/Bid ID: Blank

Where:

Show Budget Codes     Vendor Summary  
 Break/Total             Show Status     Include Moved Items

Sort options: Primary: None    Secondary: None

Document Detail: Fund: A    Budget Code: ?????-???-??-??-13    Budget Type:

Crystal: <default report>    Print Settings    Cancel