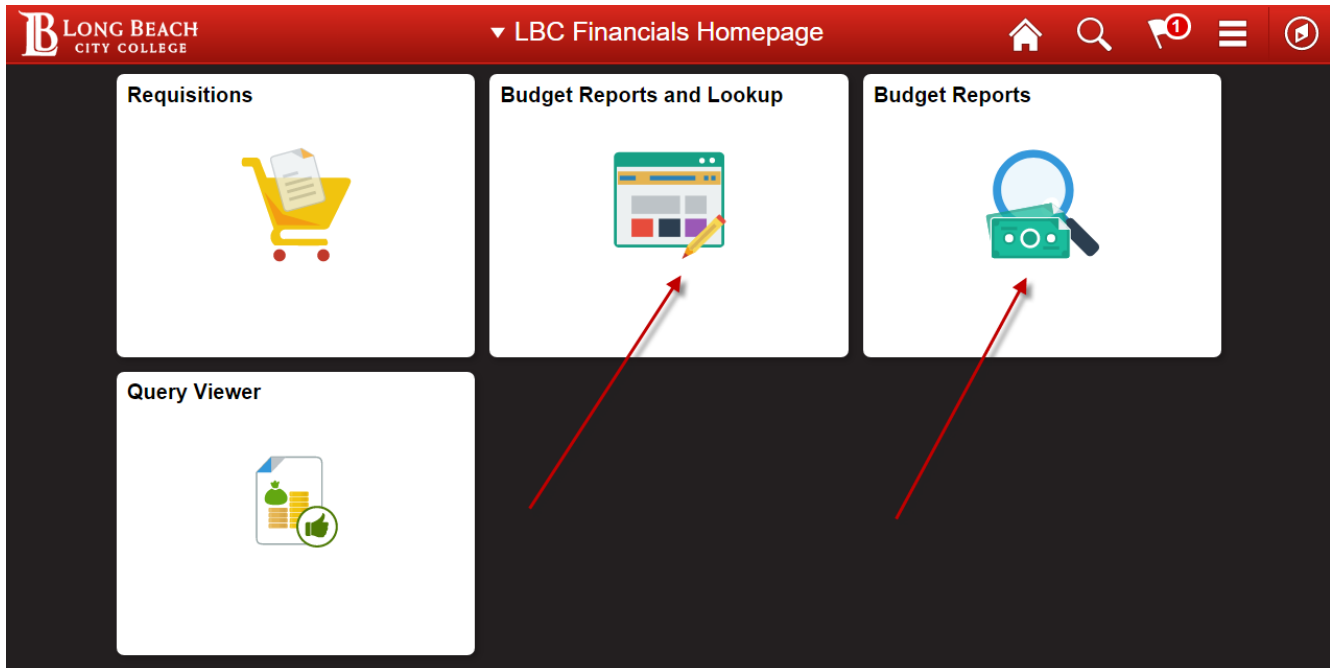# LBC PO ACTIVITY LISTING REPORT 9.2

LBC PO Activity Listing Report 9.2 – LBCGL013

1. The **LBC PO Activity Listing** is a detailed report showing Purchase Orders and Contracts, along with the corresponding Requisition number, Vendor name, and Vouchers for the Payments of the document. To view or print a report on a specific Purchase Order or Contract, access the **LBC PO Activity Listing** from either the **Budget Reports** tile or the **Budget Reports and Lookup** tile.

NOTE: When signing out or closing PeopleSoft 9.2 remember to click the [⋮] button then go to **Sign Out** and **DO NOT** just click the red [X] close button.

2. From the **LBC Financials Homepage** click the **Budget Reports** tile then the **LBC PO Activity Listing** menu item on the left side.

3. Each user should initially set up (Add) <u>one time only</u>, a **Run Control ID** for each process/report that will be carried out (such as the LBC Available Balance Report, LBC GL Expense Detail Report, and LBC PO Activity Listing Report). The Run Control ID is keyed to the Operator ID of the user that created the Run Control. After this **Add a New Value** is done the first time you will use the **Find an Existing Value** tab for <u>all</u> future **LBC PO Activity Listing.** Please do **NOT** add any other Run Control ID's.

NOTE: To access a **current** Run Control ID (a Run Control for LBC PO Activity Listing Report that was set up earlier), click the **Find an Existing Value** tab and then click **Search**. Choose the Run Control ID below named **LBC PO Activity Listing** and click on the blue link.

4. To Add the Run Control ID select the **Add a New Value** tab and enter **LBC_PO_ACTIVITY_LISTING** (be sure to put an underscore between each word and use caps) i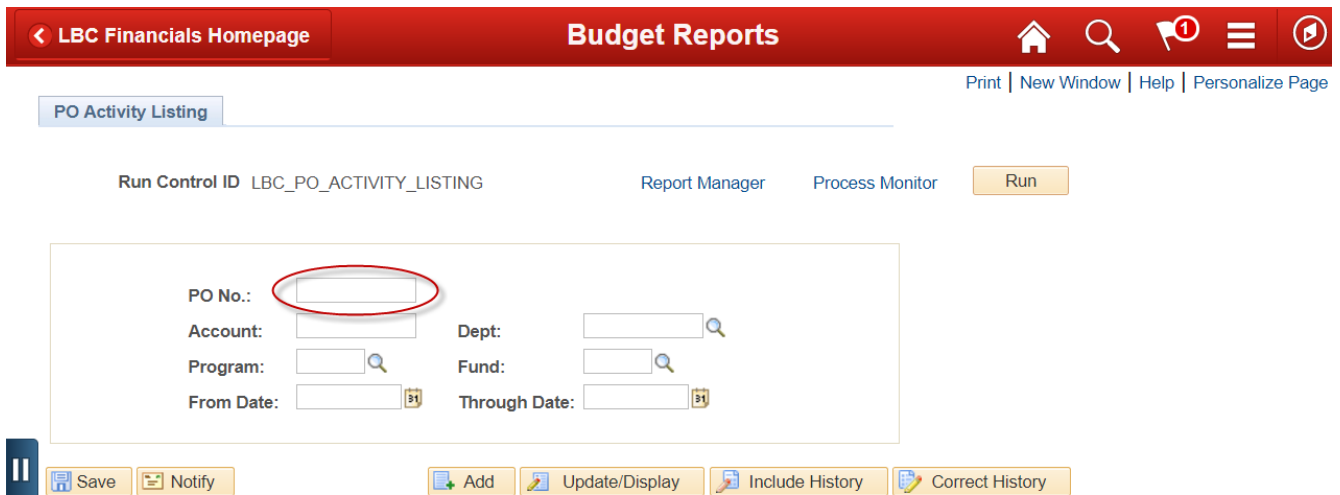n the **Run Control ID** field then click **Add.** Note that the 2 vertical lines button can be used to collapse or expand the menu on the left.

5. Enter the Purchase Order Number in the **PO No.** field for the Purchase Order number you wish to view in your report.

NOTE: The Purchase Order Number (**PO No.**) is a 10 digit field with the PO number preceded by 5 zeros. If entering a Contract number there are no preceding zeros but you do need to enter the decimal point.

NOTE: The **LBC PO Activity Listing** can also be run by using the account string (Account, Department, Program and Fund) and a **From Date** and a **Through Date**, and leaving the **PO No.** field blank to view all the PO's issued with that criteria.

6. After entering the Purchase Order number under the **PO No.** field click the yellow **Run** button on the top right side.

NOTE: If you enter a specific PO Number to run the report then it is important to leave **ALL other fields blank in the criteria fields.** If you do not have a PO Number you can enter the **From Date** and the **Through Dates** along with the Chartfields (Account, Dept, Program, and Fund) for the area you need and then view all PO's that are issued for a specific Chartfield string.

7. In the Process Scheduler Request panel you will see the report Name/Description **LBC PO Activity Listing**. Next click the yellow **OK** button below and **DO NOT MAKE ANY OTHER CHANGES** in this panel.

8. After clicking the **OK** button this previous panel will show again yet the **Process Instance** indicates that the report is running so **DO NOT** click the Run button again. From this panel click the **Report Manager** link at the top of the page. The report can be viewed by clicking the Notification button on the red title bar as well.

9. The next panel under the **Administration** tab click the yellow **Refresh** button on the right side until the **Status** is **Posted** and the **Details** link shows to the right of the **Posted** status. In the Report Manager panel the current report will always be at the top of the Report List. To view the report you can either click the blue **LBC PO Activity Listing** link **OR** click the **Details** link next to the **Posted Status** on the **LBC PO Activity Listing** line.

NOTE: If you need to access a report from a previous day you can change the number under **Last** from 1 to any number up to 7 Days and then click the yellow **Refresh** button.

10. In the **Report Detail** panel click the **LBCGL013   .PDF** name under the File List.

11. Selecting the **LBCGL013.   PDF** file opens another page with the report. From this page the report can be saved, printed or emailed by clicking one of the icons on the left side of the panel.