Important Notes to Using & Reviewing Your Results

- Notes

  - **Data Population**
    This report is populated with data from PS_PO and relating tables.

  - **Items without a Budgeted Amount**
    All Actuals will print to the report regardless of the corresponding Budget Account possessing a dollar amount or zero entry.

  - **Actuals**
   Actuals are from approved and posted transactions.

Locate Report

1. From the Budget & Planning **Reporting Page**, locate "FIN006 - Purchase Orders".

2. **Login** to Microsoft Power BI to run the report.

Report Setup- Prompt Pages

Report Setup - Prompt Pages

All initial **Landing Pages** for reports in Microsoft Power BI will Appear similar in format. You will have a set of filtering choices based on the source's available data.
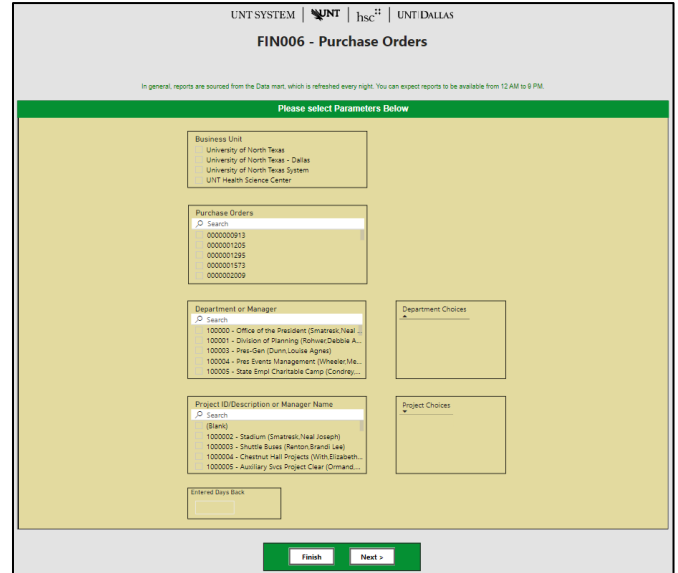
REPORT FOCUS FILTERS / PAGE 1

1. Select your parameter choices. (No parameters within this report are required).

Business Unit	Default will pull "All Units" or you may use the **Dropdown** to select one particular unit by which to filter the report.
Purchase Order	If you have a Purchase Order ID you would like to filter by, please search here.
Department ID/Descr or Manager	You can **Search** by either the Dept ID, Description, or Manager Name. Your selections appear in the choices box. Hover over the top left corner within the filter to clear selections (eraser icon).
Project ID/Descr or Manager	You can **Search** by either the Project ID, Description, or Project Manager. Your selections appear in the choices box. Hover over the top left corner within the filter to clear selections (eraser icon).
Entered Days Back	You may use this prompt to filter your data to a certain number of days back from the current date (i.e. 30 days back).

2. If you are satisfied with your choices and do not need to engage Detailed Filters, click the **Finish Button**. Otherwise, to run by other FoaPs elements, click the **Next Button**.

DETAILED FILTERS – ADDITIONAL INCLUSIONS/EXCLUSIONS / PAGE 2

1. Select your parameter choices.

   Remember that prompts filter your data. By entering values into the prompts you narrow the result sets. Start off by casting a wide net by only using one prompt. You can always rerun the report with additional prompt to narrow the results as needed.

Requisition	You can **Search** by Requisition ID(s) using checkbox filter.
Vendor	You can **Search** by Vendor Name(s) using checkbox filter.
Commodity Code	You can **Search** by Commodity Code Descr using checkbox filter.
Purchase Order Status	Default will pull all Purchase Order statuses. You can adjust existing selections using checkbox filter. Hover over the top left corner within the filter to clear selections (eraser icon).

2. If you are satisfied with your choices and do not need to additional Filters, click the **Finish Button**. Otherwise, to view additional filters, click the **Next Button**.

DETAILED FILTERS – CHARTSTRING INCLUSIONS/EXCLUSIONS / PAGE 3

3. Select your parameter choices.

   Remember that prompts filter your data. By entering values into the prompts you narrow the result sets. Start off by casting a wide net by only using one prompt. You can always rerun the report with additional prompt to narrow the results as needed.

Fund Category	Include/Exclude multiple Fund Cats using checkbox filter.
Fund	Include/Exclude multiple Funds using checkbox filter.
Function	Include/Exclude multiple Functions using checkbox filter.
Department	If you chose Department(s) on the first page, they will automatically appear in the choices box to the right of the prompt. You can add to your initial selection here.
Account	Include/Exclude multiple Accounts using checkbox filter.
Project	If you chose Project(s) on the first page, they will automatically appear in the choices box to the right of the prompt. You can add to your initial selection here.

PC Business Unit	Include PC Business Unit relating to projects here. If using a PCBU, **only one** may be filtered for at a time.
Activity	Include/Exclude multiple Activities using the checkbox filter.
Program	Include/Exclude multiple Programs using the checkbox filter.
Purpose	Include/Exclude multiple Purposes using the checkbox filter.
Site	Include/Exclude multiple Sites using the checkbox filter.

4. When you are satisfied with your choices, **click** the **Finish Button** to run the report.

If you need to make changes or want to check your filters, you can click the **Back to Prompts Button at any time to review and click the Finish Button from any point without having to re-enter your information.*

Report Results

Report Results

REPORT FEATURES

- Results are grouped by **Purchase Order ID**.
- **PO Header** information appears first in the reporting structure grouping, including Supplier, Ship To, and Bill To addresses.
- **PO Line and Schedule** details appear next, sorted by PO Line and Schedule Number, followed by PO Distribution Line details.
- **PO Distribution Line** details are broken down into three tables: **Chartfields**, **Details/Tax**, and **Req Details**, each sorted by Distribution Line Number(s).
- If *multiple* Purchase Orders are pulled, the report will display results in PO ID sort order.

Report Functionalities

LAYOUT OVERVIEW

- Report results are typically displayed in an interactive HTML on screen style.
- Based on your selections, if any, the report will only display results that match your initial filtering choices.
- Use the **arrows** to navigate between pages (if any).
- Use the double forward arrow to skip to the last page of **Applied Parameters** where you can review what your filtering choices were on the initial **Prompt Page** selections. Use the double back arrow to return to the first report page.
- If there is an error in your request or no results can be produced, you get a return message showing the parameters you chose that produced these results. *(See the* <u>*Error Results section*</u> *below for more information or to troubleshoot.)*
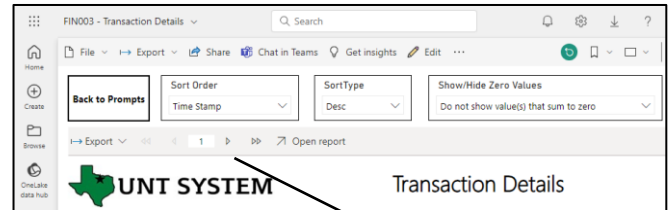
Exporting Your Report Results

Exporting Your Report Results

Below the Back to Prompts button on the report results page, you will see options to **Export** your results, as needed.

- XLS
- PDF
- CSV
- PPTX
- DOCX

EMAIL REPORT DIRECTLY

Click the **"Share"** symbol in the top toolbar to share the report link via Microsoft Outlook, Teams, or PowerPoint. Alternatively, you can copy the link to your clipboard. If you choose to **Include your Changes**, your filters will be saved within the link you send to others.
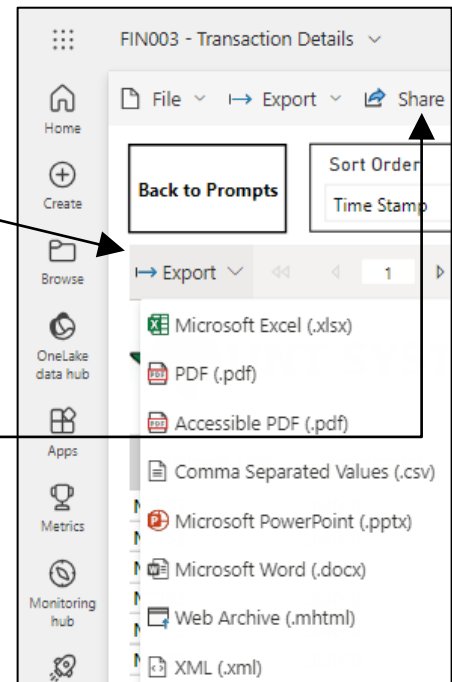
Error Results

RUN REPORT ERROR

When the requested filters result without a match for data, Power BI displays the following:
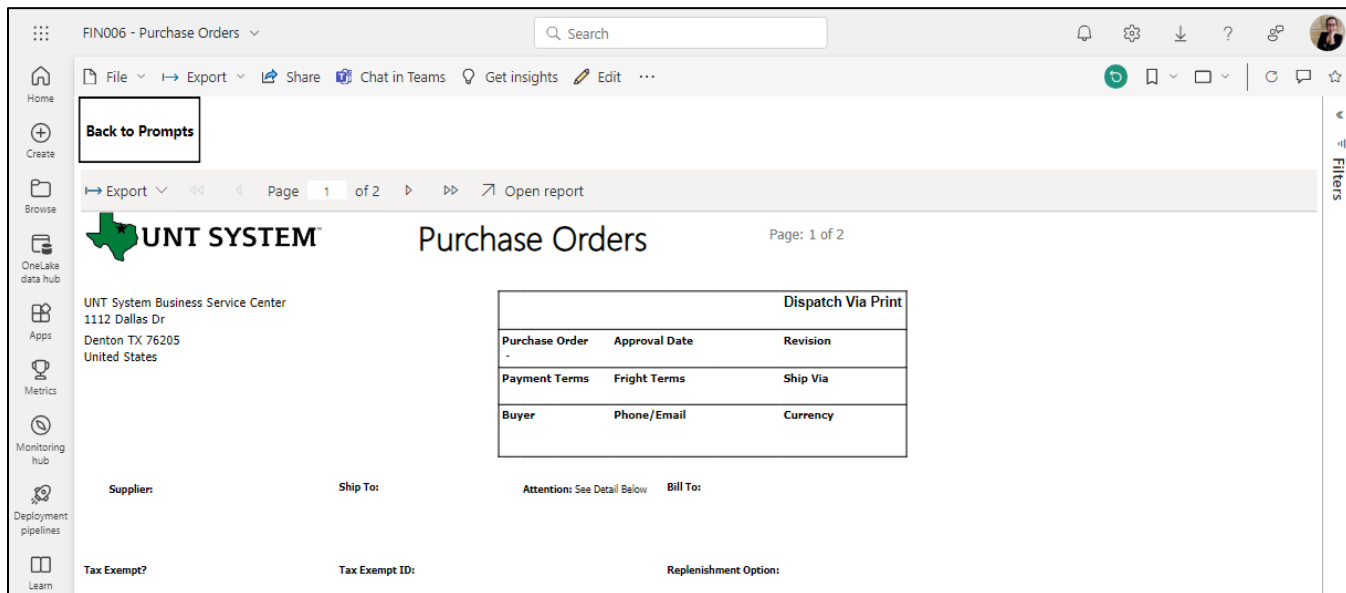
If you need to return to the prompts to adjust them, click the **Back to Prompts** button in the top left corner.