IMPORTANT NOTES TO USING & REVIEWING YOUR RESULTS

LOCATE REPORT

REPORT SETUP - PROMPT PAGES

REPORT RESULTS

EXPORTING YOUR REPORT RESULTS

ERROR RESULTS

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 “P2P001 - Purchase Order Summary Report”.

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).

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Default will pull “All Units” or you may use the Dropdown to select one particular unit by which to filter the report.</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>Default will not narrow selections, unless selected here.</td>
</tr>
<tr>
<td>Multi-Year</td>
<td>Default will not narrow selections, unless selected here.</td>
</tr>
<tr>
<td>Accounting Period</td>
<td>Default will not narrow selections, unless selected here.</td>
</tr>
<tr>
<td>PO Reference</td>
<td>You can Search by PO Reference using checkbox filter.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>You can Search by Purchase Order ID(s) using checkbox filter.</td>
</tr>
<tr>
<td>Requisition</td>
<td>You can Search by Requisition ID(s) using checkbox filter.</td>
</tr>
<tr>
<td>Marketplace Encumbrances Only?</td>
<td>Default will not narrow selections, unless selected here to pull only Jaggaer/Marketplace PO’s.</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>You can Search by Commodity Code. Hover over the top left corner within the filter to clear selections (eraser icon).</td>
</tr>
<tr>
<td>PO Date older than number of days back</td>
<td>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).</td>
</tr>
</tbody>
</table>
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**

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.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Selection Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vendor</strong></td>
<td>You can Search by Vendor ID or Name using checkbox filter.</td>
</tr>
<tr>
<td><strong>Buyer</strong></td>
<td>You can Search by Buyer EUID or Name using checkbox filter.</td>
</tr>
<tr>
<td><strong>Entered By</strong></td>
<td>You can Search by Entered By EUID(s) using checkbox filter.</td>
</tr>
<tr>
<td><strong>Blanket Order</strong></td>
<td>Default will not narrow selections, unless selected here.</td>
</tr>
<tr>
<td><strong>Procurement Method Description</strong></td>
<td>Default will not narrow selections, unless selected here.</td>
</tr>
</tbody>
</table>
Budget Header Status (Include) | Default will not narrow selections, unless selected here.
---|---
Budget Header Status (Exclude) | Default will not narrow selections, unless selected here.
Contract | Default will not narrow selections, unless selected here.
Include Project(s) | You can narrow results by including Project ID(s). Hover over the top left corner within the filter to clear selections (eraser icon).
Exclude Project(s) | You can narrow results by excluding Project ID(s). Hover over the top left corner within the filter to clear selections (eraser icon).
Budget Checked | Default will not narrow selections, unless selected here.
Remaining Encumbrance ≠ | Default to each extremity, this prompt allows up to 2 characters in 1-digit increments if you are searching for a specific transaction.

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 sorted by Purchase Order.
- Distinct Requisition and Purchase Order Counts appear in the first subtotal row, despite the number of lines on a PO.
- Days to Dispatch Averages appear in the second subtotal row, excluding non-business hours and holidays. The Total Encumbrance, Liquidated, and Remaining Encumbrance totals also show in this row.
- Restricted Commodity Codes appear in red.

**DRILL-THROUGH OPTIONS**

- Coming soon...
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 Error Results section 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.

Error Results

DRILL-THROUGH MESSAGE OR ERROR

Coming soon...