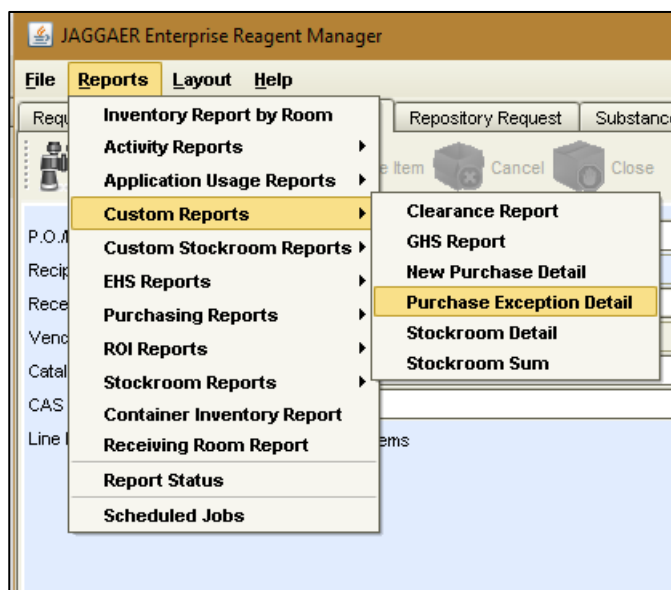


How to Create a Purchasing Report

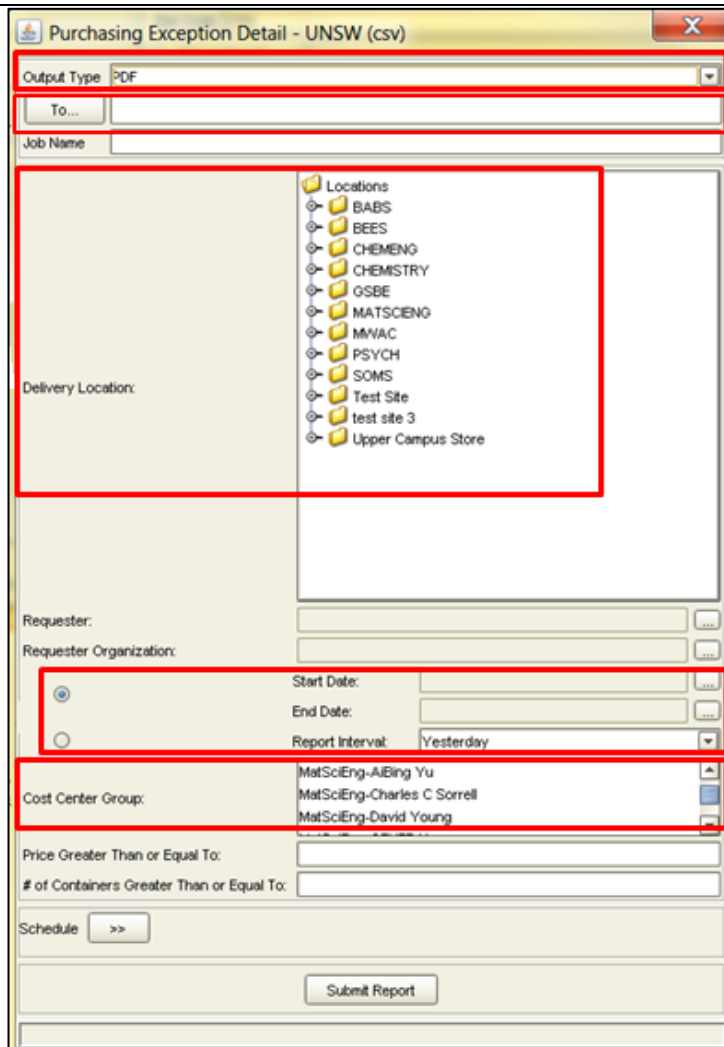
How to Create a Purchasing Report



People with **Scientist Administration access** will be able to set up purchasing reports for the Research Group Heads in their school / centre as per below to assist them monitor purchasing activity for their area

- ▶ Select “Reports” heading. In the drop-down menu select “Custom Reports” → “Purchase Exception Detail”

How to Create a Purchasing Report



Purchasing Exception Detail - UNSW (csv)

Output Type: PDF

To...

Job Name

Delivery Location:

- Locations
 - BABS
 - BEEES
 - CHEMENG
 - CHEMISTRY
 - GSBE
 - MATSCIENG
 - MWAC
 - PSYCH
 - SOMS
 - Test Site
 - test site 3
 - Upper Campus Store

Requester:

Requester Organization:

Start Date:

End Date:

Report Interval: Yesterday

Cost Center Group:

- MatSciEng-AiBing Yu
- MatSciEng-Charles C Sorrell
- MatSciEng-David Young


Price Greater Than or Equal To:

of Containers Greater Than or Equal To:

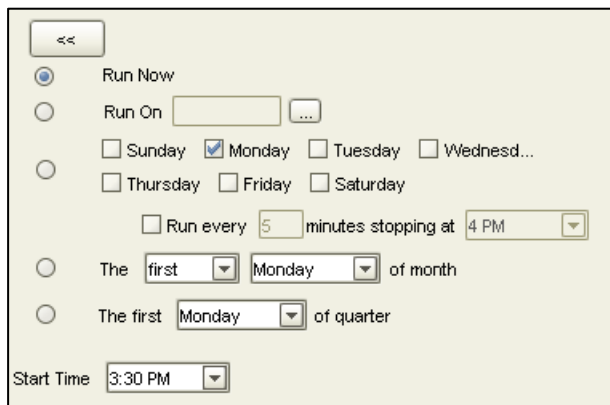
Schedule >>

Submit Report

This brings up the report set up window.

- ▶ Output Type: Select "CSV" file
- ▶ To: Select who the report will be sent to by pressing "To" button or type in an email
- ▶ Delivery Location: Select the relevant school
- ▶ Requester: Press button if you want to just see requests made by a particular requester (if desired)
- ▶ Requester Organisation: Press  button to select the requester organisation (e.g. a research group) if desired
- ▶ Enter a Start and End date or select an interval such as yesterday, last week, last month or last quarter
- ▶ Cost Centre Group: Select the required cost-centre group or multiple cost-centre groups. If none is selected then the report will be for all groups that belong to the school selected in

How to Create a Purchasing Report



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Run Now

Run On ...

Sunday Monday Tuesday Wednesd...


Thursday Friday Saturday

Run every minutes stopping at

The of month

The first of quarter

Start Time

- ▶ Schedule: Click  button to reveal scheduling options
- ▶ Set the report up to run at the required frequency (daily at a particular time for example)
- ▶ Press "Submit Report" to complete setting up the report.