

# How to Create a Purchasing Report

## How to Create a Purchasing Report



JAGGAER Enterprise Reagent Manager

File Reports Layout Help

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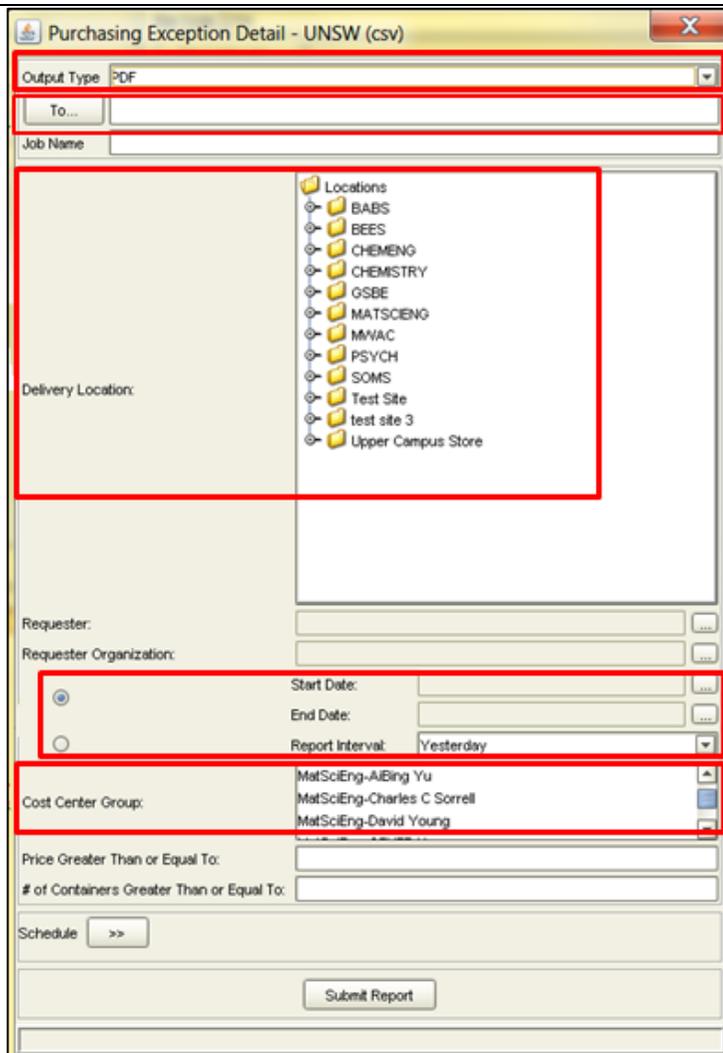
New Purchase Detail  
Purchasing Exception Detail - UNSW  
Purchasing Exception Detail Report  
Purchasing Exception Report

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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 “New Purchasing Reports” → “Purchase Exception Detail”

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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

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Run Now

Run On  ...

Sunday  Monday  Tuesday  Wednesday...

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.

## Linking Purchasing order with Requisitions Process

New Purchase Detail (csv)

Delivery Location: MATSCIENG

Requester: All

Cost Center Group: MatSciEng-AiBing Yu

Requester Organization: All

Reporting Period: All Dates

Report Generated by: Martina Lavin on 2014-Apr-15

Date Subm	Requisition ID	Requisition Line No	Po Number	PO Line No	Requester
8-Apr-14	710	1	Mats-hj776-89666	22	Lavin, Ma
8-Apr-14	710	2	Mats-hj776-89666	23	Lavin, Ma
8-Apr-14	710	3	Mats-hj776-89666	24	Lavin, Ma
8-Apr-14	710	4	Mats-hj776-89666	25	Lavin, Ma
8-Apr-14	710	5	Mats-hj776-89666	26	Lavin, Ma
8-Apr-14	710	6	Mats-hj776-89666	27	Lavin, Ma
8-Apr-14	710	7	Mats-hj776-89666	28	Lavin, Ma

- ▶ Using the New Purchase report generated from Jaggaer Operation module, populate information from NSS financial system to the columns with the headers "PO number" and "PO line number" for the correct line item. *These 2 columns are highlighted below for illustration purposes*
- ▶ Once the PO numbers and PO line item numbers are entered for each requisition item **save** the CSV file.

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### Welcome to the PO Assignment HMDG web application

Click to Submit Your HMDG CSV File:

- ▶ Access on the PO uploader API weblink:  
(<http://149.171.56.54:8080/UNSWHMDGRequisitionIntegration/ront/UNSWRequisition.jsp>)
- ▶ Login in with your z number and normal network password
- ▶ Browse for the CSV file and then click on the “Click to Submit” button.