

Quick Reference Guide: How to Run the Open PO Report



Purpose:

The open Purchase Order (PO) report will give Financial Analysts information on all POs for their given data access level containing all of the below information.

REQUIREMENT: User must have the Financial Analyst role. To obtain this role, submit a WaveWorks Service Now Access request including the data level needed to receive.

- Purchase Order Number (numbers beginning without PO are converted POs from SciQuest)
- Creation Date
- Purchase Order Status (open, closed for receiving)
- Requisition Source (catalog, non-catalog, etc)
- Supplier
- Site (this is the Supplier Site)
- Buyer Name
- Payment Terms
- Purchase Order Total Amount
- Currency Code
- Requisition Number (converted POs will not have a requisition number)
- Line Number (number of lines on the PO)
- Description
- Purchase Requestor Name (who initiated the requisition)
- Item Description
- Category Name
- UOM (unit of measure)
- Price
- Purchase Order Line Amount
- Match Approval Level (3-Way match levels require receipts)
- Concatenated Segment (Accounting Chart String i.e. where is the item being paid from)
- Department (Cost Center)
- Department Name
- Received Quantity (Could be goods or dollar quantity)
- Location Code
- Invoice Number
- Invoice Amount
- Payment Number
- Payment Amount
- Remaining Quantity
- Open Value
- Remaining Value



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Step-by-Step:

Once signed into WaveWorks, click on the Tulane Reporting tab.

Tulane Reporting

Click on Open PO Report.



Open PO Report

Enter desired search Criteria.

To retrieve data, at least one search criteria is needed

If using dates, use both from and to date

To see Converted SciQuest POs, use July 1, 2023 as the from date

Click Apply.

Find the downloaded report.



Review the report.

