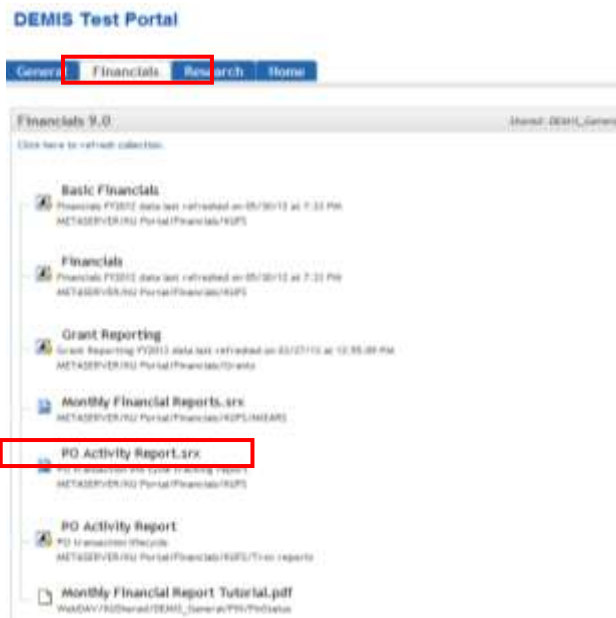


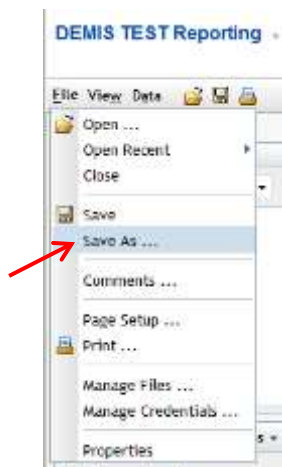
PO Activity Report: [Saving Reports](#), [Basics of Running a Report](#), and [Setting Print Options](#) (PDF only).

After Accessing “Financials” Link, Select “PO Activity Report.srx”

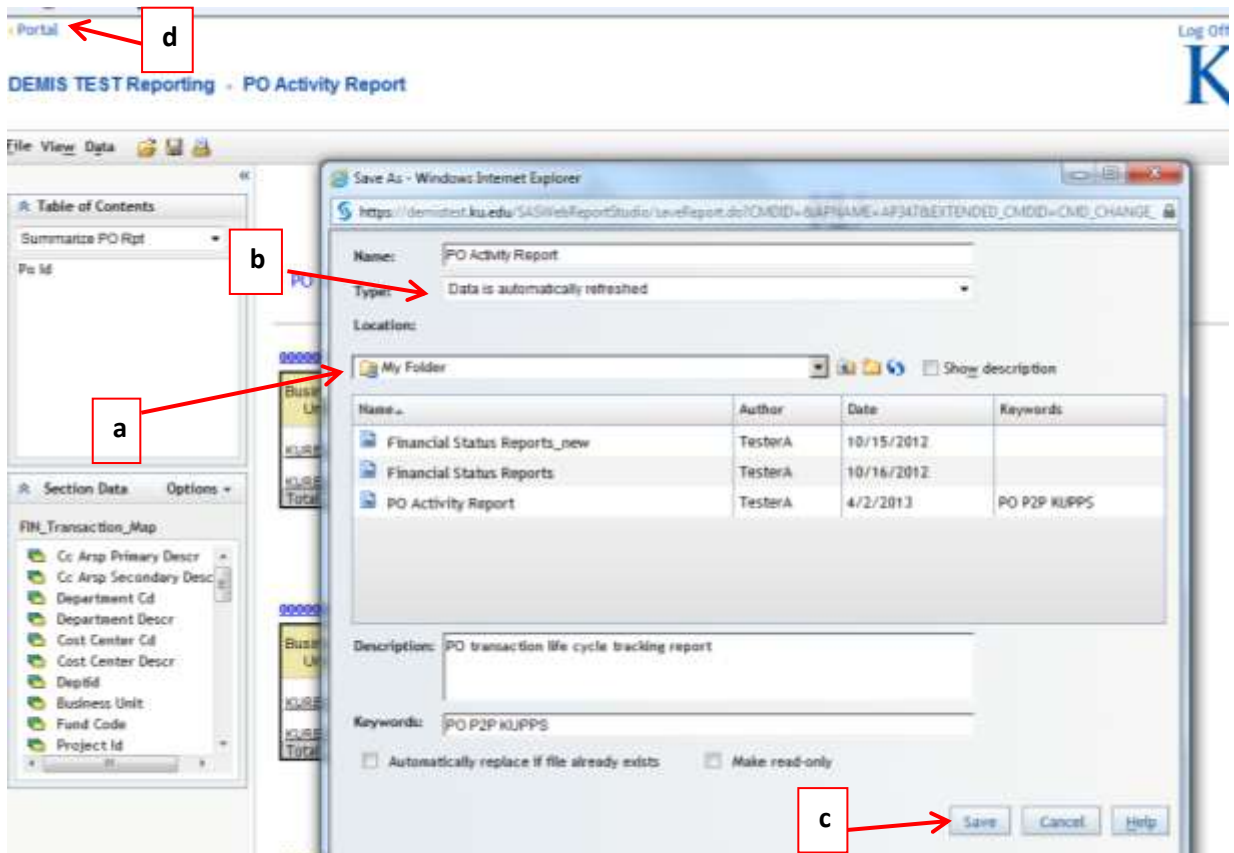


## Section I: Saving Reports

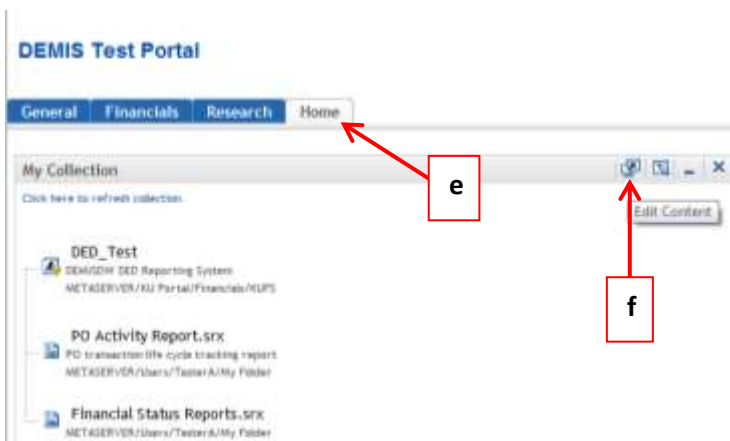
1.) For First time users: Click File > Save As.



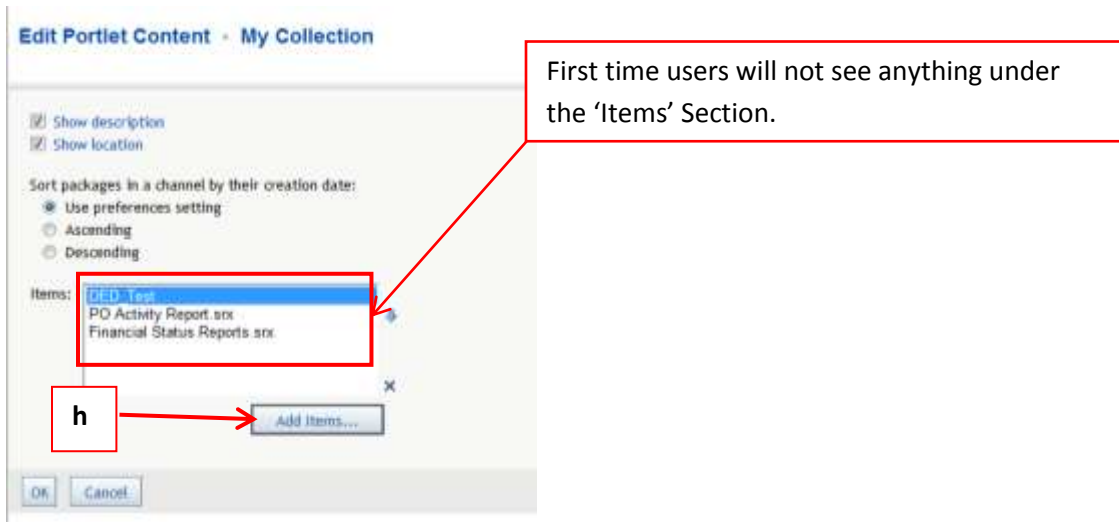
- 2.) Select folder 'My Folder' (a) using the drop down arrow; Make sure type is set to 'Data is automatically refreshed' (b); Then click the Save button (c) and click 'Portal' to return to the home screen (d).



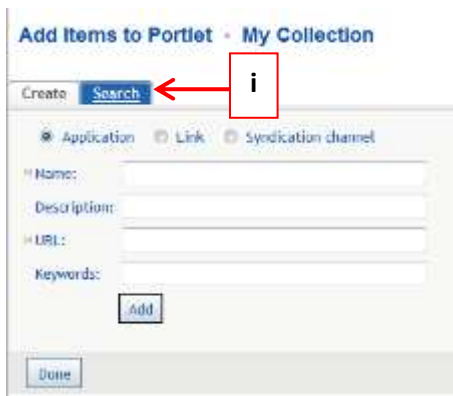
- 3.) In the top left corner click on the 'Home' tab (e) and click on the 'Edit Content' icon (f).



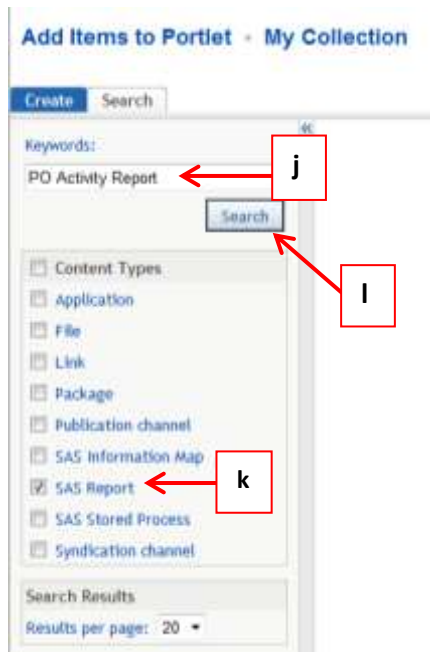
4.) Select 'Add Items...' (h).



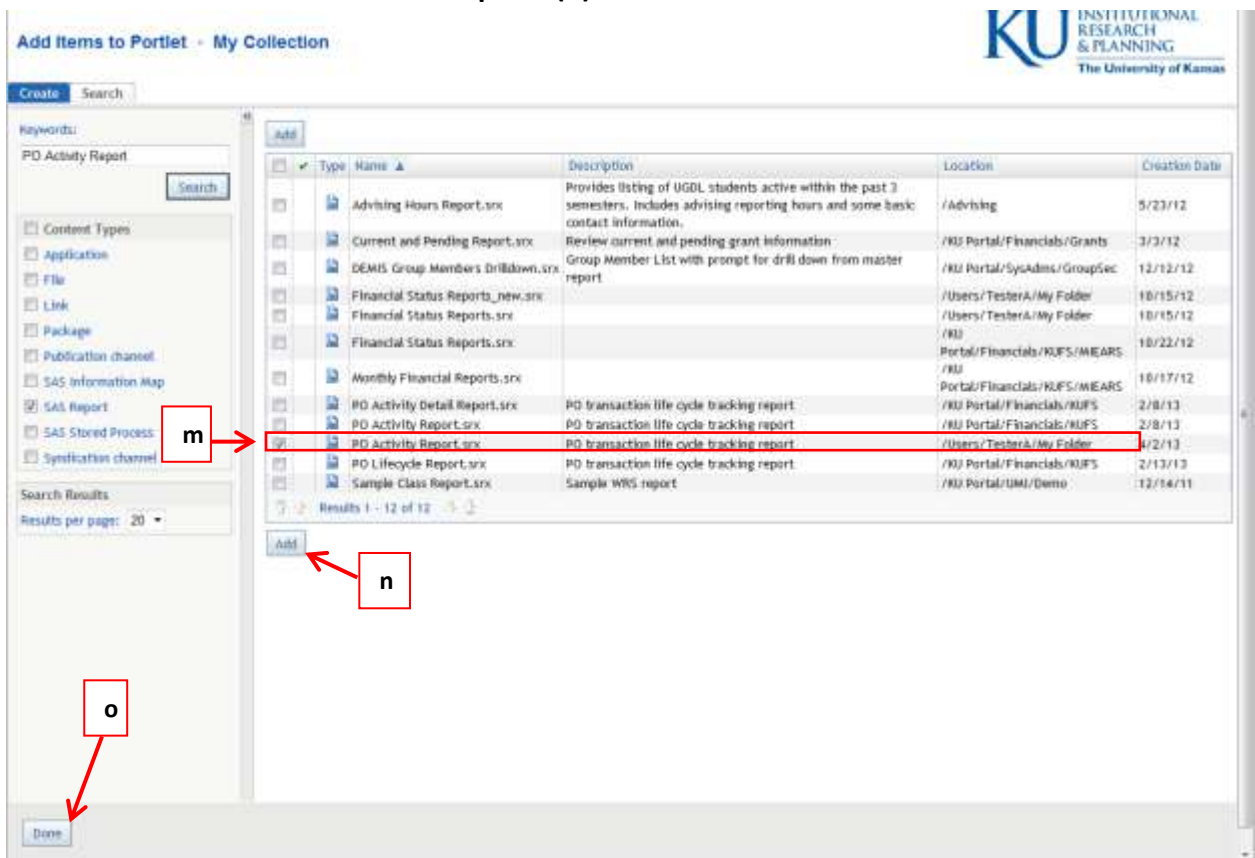
5.) Click the 'Search' tab (i).



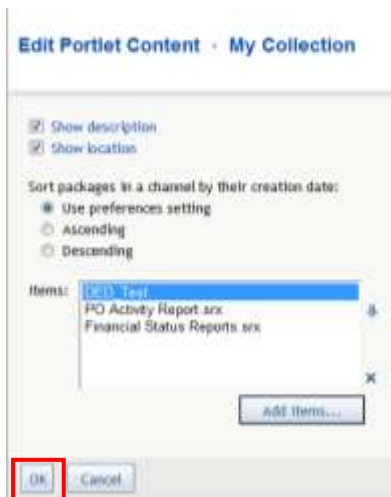
6.) Type 'PO Activity Report' into the search box (j) and check the 'SAS Report' Box (k); Click the 'Search' button (l).



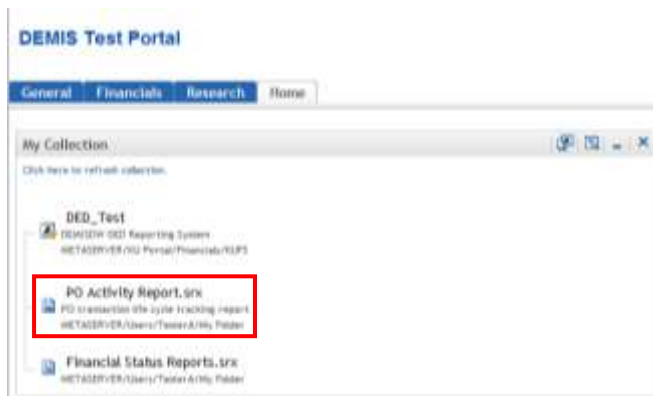
7.) Check the box with Location: '/Users/\*user\_name\*/MyFolder' (m); Click the 'Add' button (n); Make sure to click 'Done' to save reports (o).



8.) After clicking 'Done', select 'Ok'.



9.) 'PO Activity Reports' should now show up under 'Home' Tab on portal screen.



Note: You can reopen a report from the *Home* tab. To use your previous selection, remember to open from your *Home* tab.

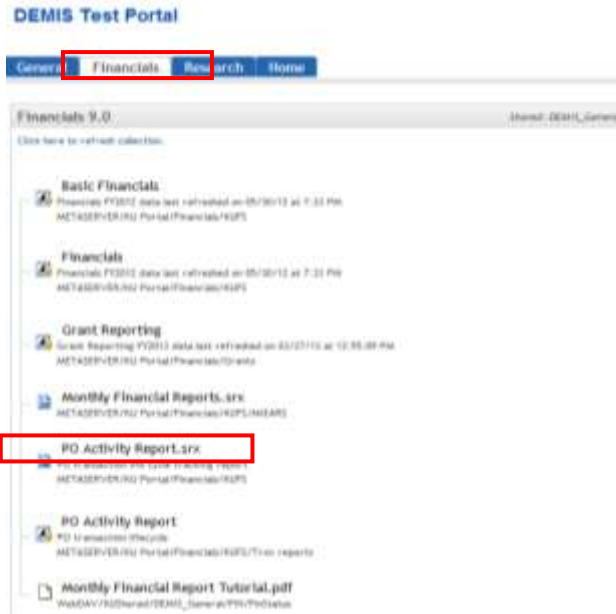
10.) To save your parameters, remember to click on the Save button before exiting.



## Section II: Basics of Running a Report

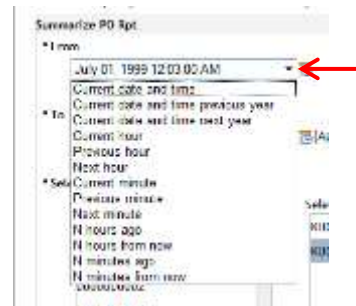
Note: If you are accessing a previous report it is easiest to do so through the *Home* tab as discussed above. If you are starting a new report follow these steps.

### 1.) After Accessing “Financials” Link, Select “PO Activity Report.srx”



### 2.) Select from Options to run Report.

Note: Drop Down Menus are available for the dates.



Note: **All** parameters must contain a selected value or an error message will occur.

DEMIS TEST Reporting - PO Activity Report

File

Answer the prompts below and click the View Report button to continue.

\*Select one or more PO IDs to submit query

Available: [all possible values] Rows 1 - 100

Selected:

000000001  
000000002  
000000003  
000000004  
000000006  
000000007  
000000008  
000000009  
000000010

A value must be entered for this prompt.

\*Vendor

Available: [all possible values] Rows 1 - 100

Selected:

Note: It is **strongly** suggested to select a vendor and reasonable date range in order to avoid unnecessarily long reports.

DEMIS TEST Reporting - PO Activity Report

File

Answer the prompts below and click the View Report button to continue.

000000010

A value must be entered for this prompt.

\*Vendor

Available: [all possible values] Rows 1 - 100

Selected: 123 PRINTING & SUPPLIES INC

123 GRAPHIC PRODUCTS LLC  
123 PRINTING & SUPPLIES INC  
20/20 CAPTIONING & REPORTS  
360 ENERGY ENGINEERS LLC  
4IMPRINT INC  
80/20 ADVANTAGE CRIMINAL J  
A DANGER AND COMPANY INC  
A LINARDI / A RESO

A value must be entered for this prompt.

Select a vendor (or multiple vendors) first

DEMIS TEST Reporting - PO Activity Report

File

Answer the prompts below and click the View Report button to continue.

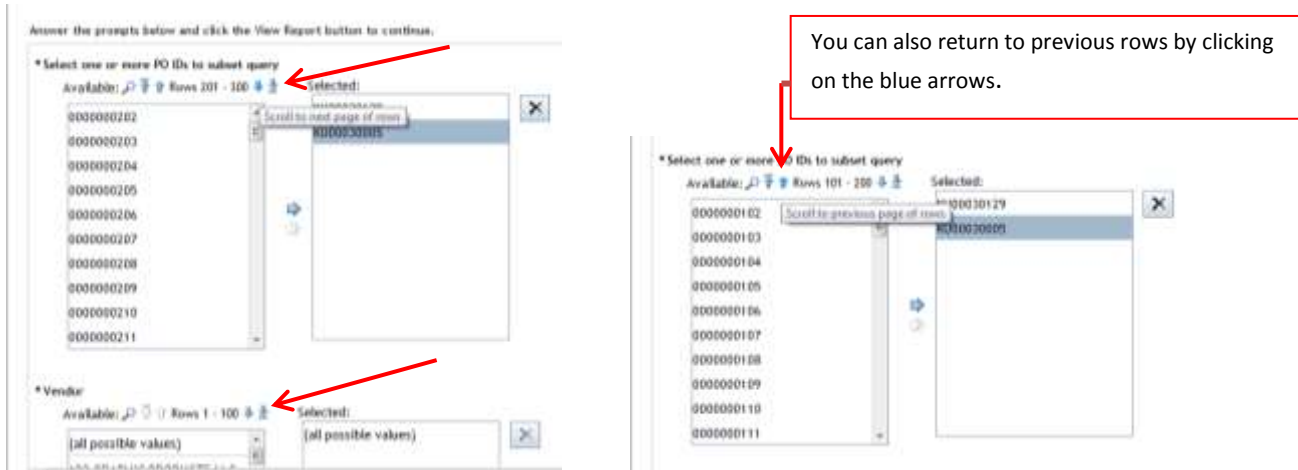
Summarize PO Rpt

\*From: Current date and time previous year [April 16, 2012 12:15:50 PM]

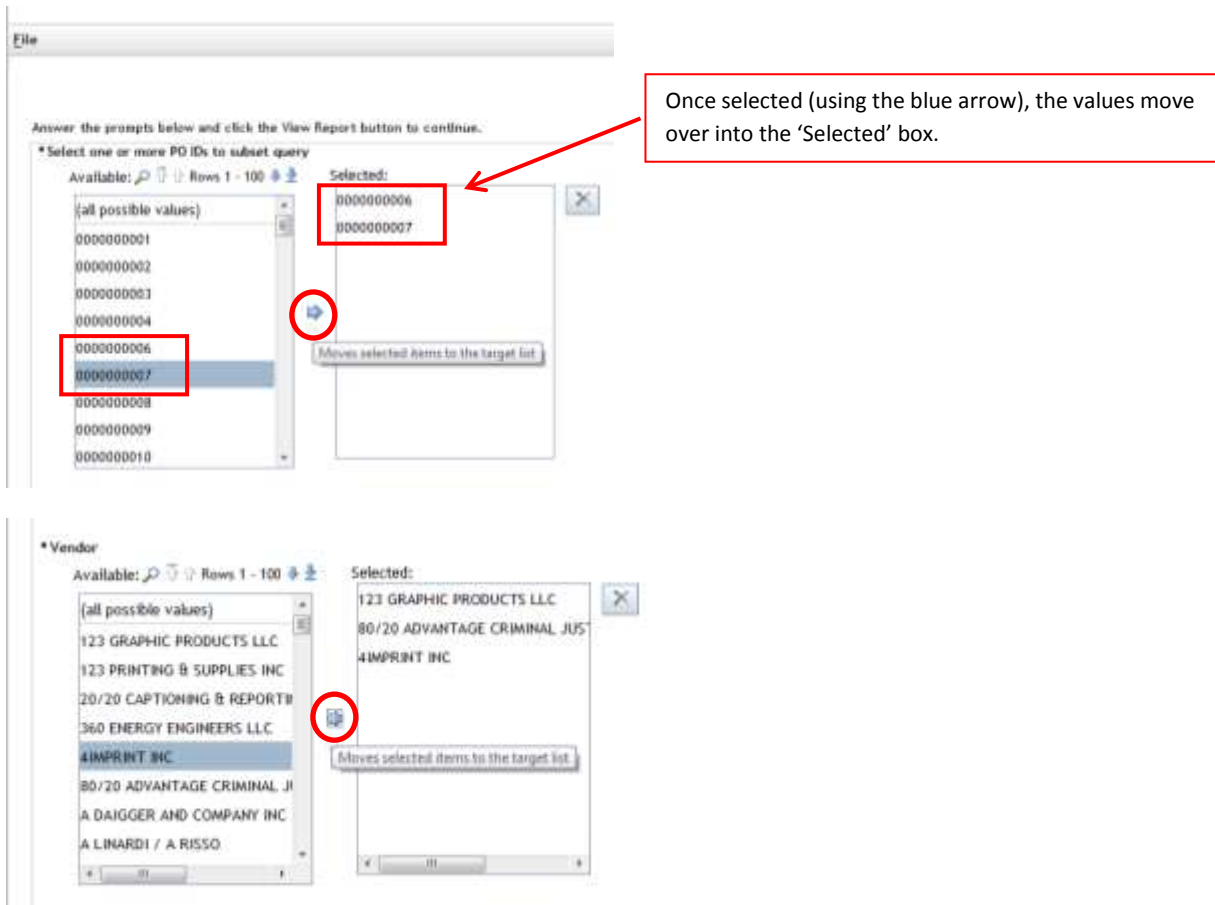
\*To: Current date and time [April 16, 2013 12:01:06 PM]

Now select a date that narrows the amount of data (from the selected vendor(s) you wish to get.

Note: There are additional rows of 'PO IDs' and 'Vendors' that you can select from. You can access other rows by clicking on the blue arrows above the boxes.

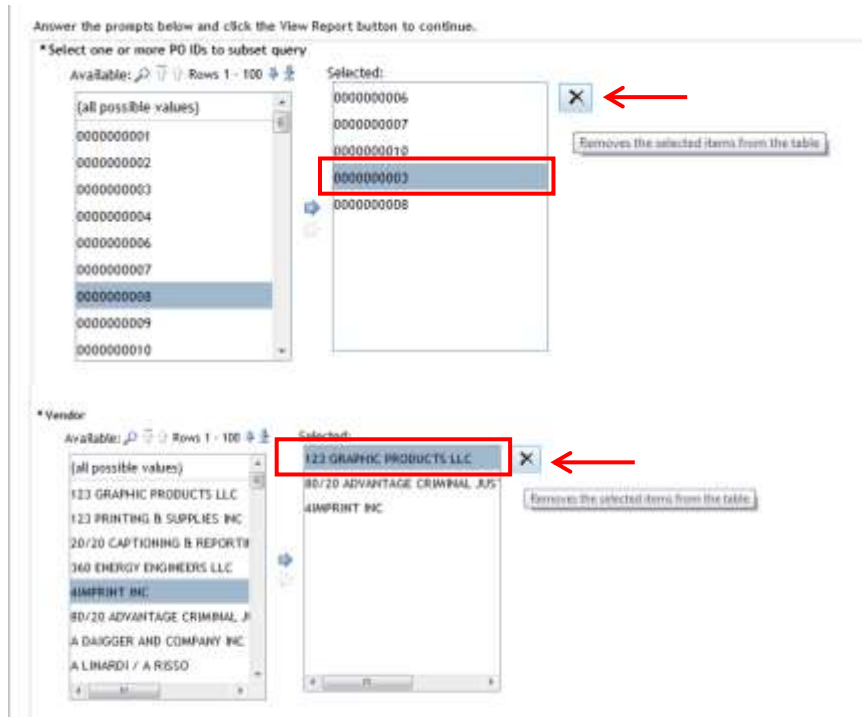


### 3.) Select the "PO IDS" and the "Vendors" using the blue arrows.

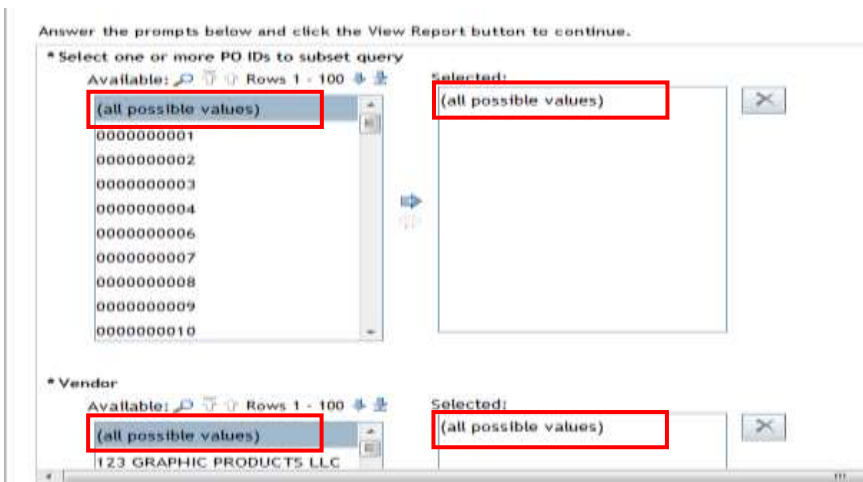




Note: If you no longer want a value in the selected box then you can unselect the value by clicking the value and then the 'X' button.



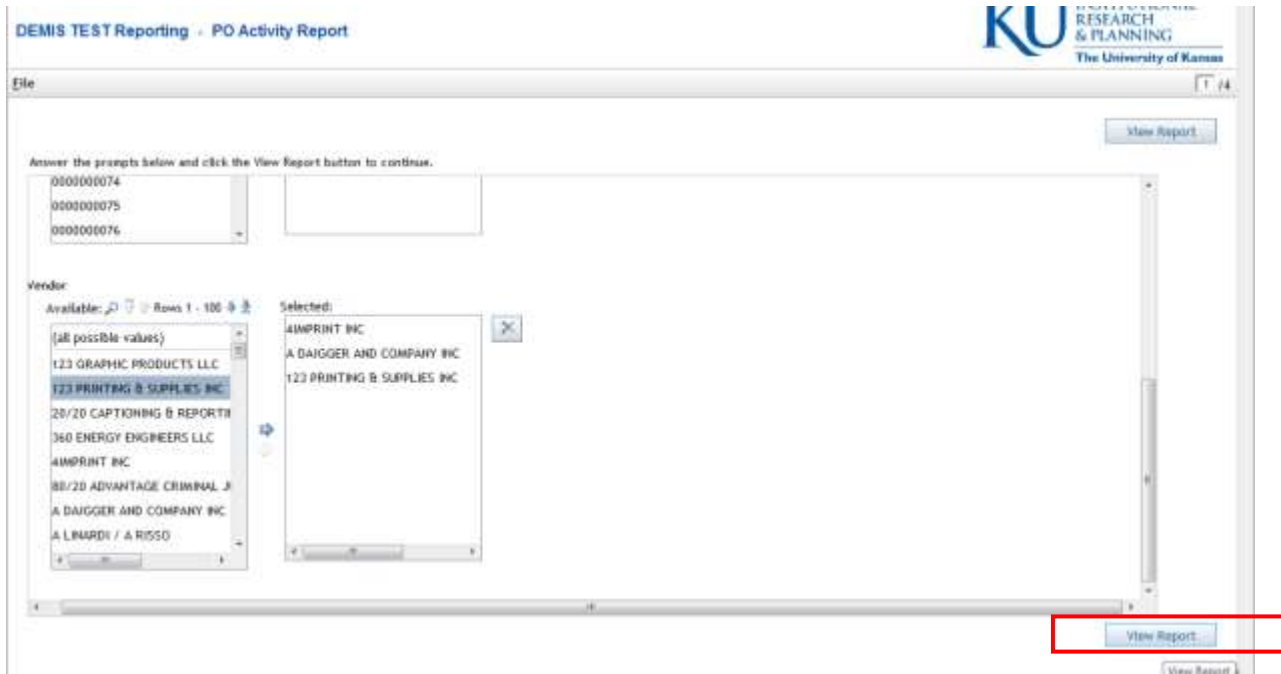
Note: A value must be selected, but you may select the option 'all possible values'.



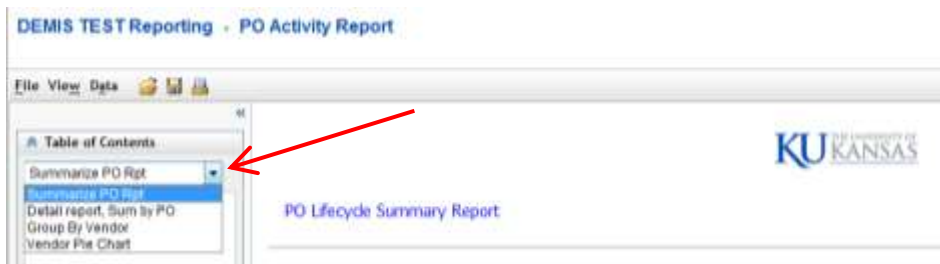
Note: You can click on the 'Reset to Default' button at any time. This will unselect all of your previous selections.



4.) After selecting desired criteria, click the 'View Report' button.



Note: Once the report appears on the screen there will be a 'Table of Contents' menu on the left-hand side. There is a Drop Down Menu where you can change the report parameters. This will be explained below.



1.) The report will open under 'Summarize PO Rpt'. All of the report will be summarized by PO ID.

**0200022985**

Business Unit	Vendor	PO Line	Voucher	PO	Voucher	PO
		Nbr	Id	Amount	Amt	Balance
UCASE	HY VEE FOOD STORES			50,500	5,000	50,500
Total				50,500	5,000	50,500

**0200060181**

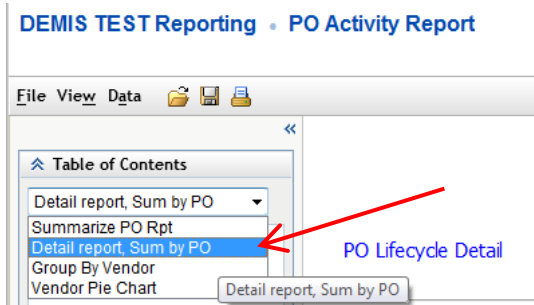
Business Unit	Vendor	PO Line	Voucher	PO	Voucher	PO
		Nbr	Id	Amount	Amt	Balance
UCASE	ADVANTAGE CRIMINAL JUSTICE TRAINI	1		1250,000	0,000	1,250,000
UCASE	ADVANTAGE CRIMINAL JUSTICE TRAINI	1	0200060183	0,000	1250,000	-1,250,000
Total				1250,000	1250,000	0,000

**0200060183**

Business Unit	Vendor	PO Line	Voucher	PO	Voucher	PO
		Nbr	Id	Amount	Amt	Balance
UCASE	ADVANTAGE CRIMINAL JUSTICE TRAINI	1		1250,000	0,000	1,250,000
UCASE	ADVANTAGE CRIMINAL JUSTICE TRAINI	1	0200060181	0,000	1250,000	-1,250,000
Total				1250,000	1250,000	0,000

2.) To switch the parameters click the Drop Down Menu under the 'Table of Contents'; Click on 'Detail report, Sum by PO'.





Note: Another way to view a specific report is to click on the PO ID while under the 'Summarize PO Rpt' section.

DEMIS TEST Reporting - PO Activity Report

File View Data

Table of Contents

Summarize PO Rpt

PO ID: 000000101

Busi Line	Click to view PO detail	Voucher ID	Po Amount	Voucher Amt	PO Balance
SKANS	8620 ADVANTAGE CRIMINAL JUSTICE TRAINING	1	1250.000	0.000	1,250.00
SKANS	8620 ADVANTAGE CRIMINAL JUSTICE TRAINING	1 000000101	0.000	1250.000	-1,250.00
Total			1250.000	1250.000	0.00

Section Data Options

DEMIS TEST Reporting - PO Activity Detail Report

File View Data

Return to previous reports

Table of Contents

Detail by PO

PO ID

PO ID: 000000101

Applied filters: Po Id equal to 000000101

Business Unit	Po Accounting Dt	Po Dt	Po Line	Distrib	Vendor Id	Vendor	Account	Fund Code	Cost Center	Project	Operating	No	Voucher	Vchr Accounting	Po	V	
			Num	Item					Descr	ID	Unit	Access	Id	Descr	Amount		
SKANS	12/31/2008 00 00 00	12/31/2008 00 00 00	1	1	0000000013	8620 ADVANTAGE CRIMINAL JUSTICE TRAINING	12770 388		2020000-CE0 KLETC						1250.000		
SKANS	12/31/2008 00 00 00		1	1	0000000013	8620 ADVANTAGE CRIMINAL JUSTICE TRAINING	12770 388		2020000-CE0 KLETC				0000000	12/31/2008 00 00 00	0.000	1	
Total																1250.000	1

Section Data Options

FBI Transaction Map

- Co Arsp Primary Descr
- Co Arsp Secondary Descr
- Department Cd
- Department Descr
- Cost Center Cd
- Cost Center Descr
- Deptal
- Business Unit

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This is the detailed report of the selected PO ID. To return to the other reports, click on "Return to previous reports" button.

3.) To switch the parameters click the Drop Down Menu under the 'Table of Contents'; click on 'Group By Vendor'.

DEMIS TEST Reporting - PO Activity Report

File View Data

Table of Contents

Summarize PO Rpt

Summarize PO Rpt

Detail report, Sum by PO

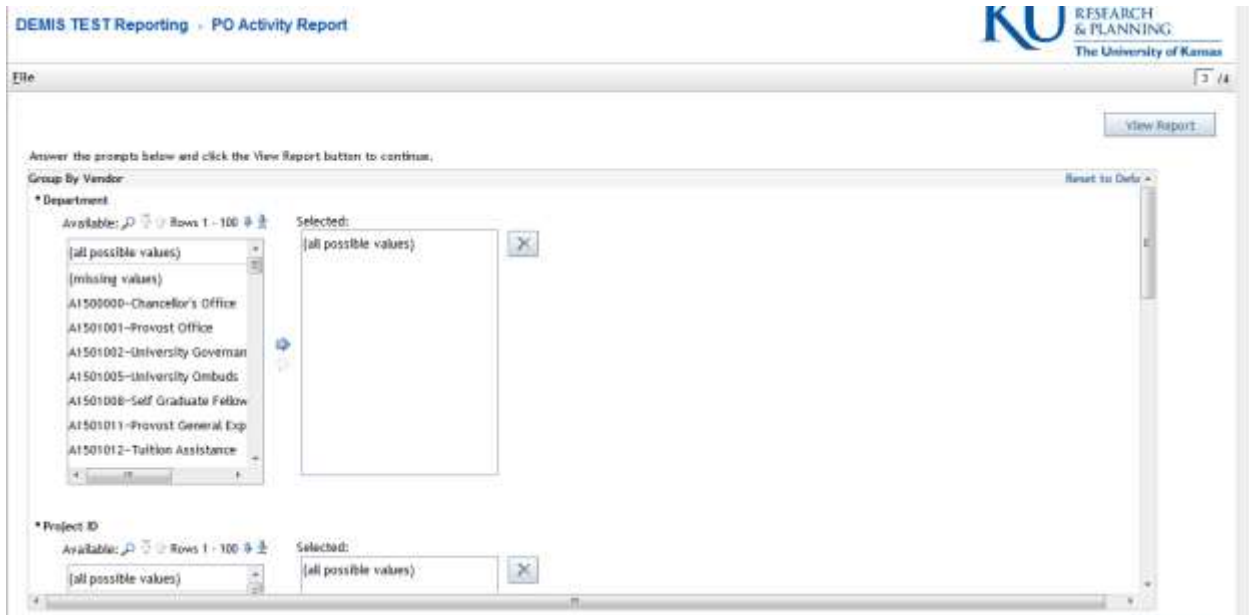
Group By Vendor

Vendor Pie Chart

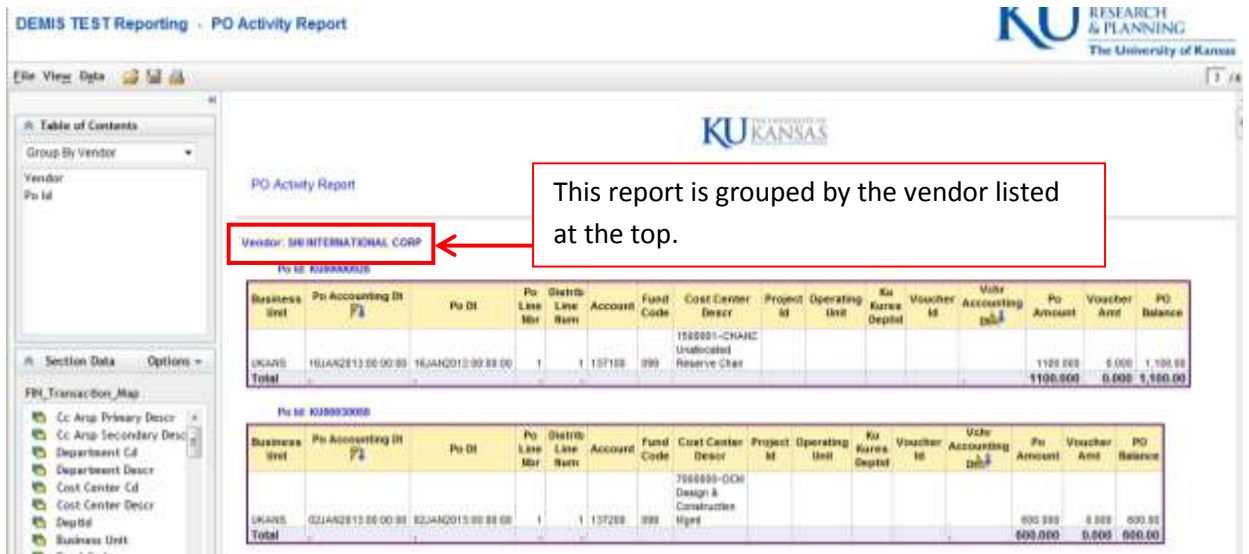
PO Lifecycle Summary Report

000000002

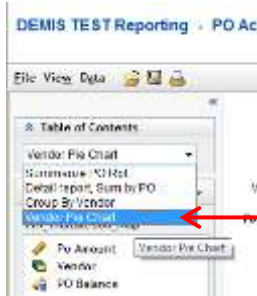
3a.) Once you select 'Group By Vendor', it will take you back to the 'Options' screen; here you can narrow your data even further by department, project ID, fund code, vendor, and date.



Note: You do **not** have to make any additional selections in this section; you may just click the 'View Report' button at the bottom of the page.



4.) To switch the parameters click the Drop Down Menu under the 'Table of Contents'; click on 'Vendor Pie Chart'.



4a.) Once you select 'Vendor Pie Chart', it will take you back to the 'Options' screen; here you can narrow your data even further by PO ID, vendor, department, project ID, fund code, and date.

DEMIS TEST Reporting - PO Activity Report

File

Answer the prompts below and click the 'View Report' button to continue.

Vendor Pie Chart

\* Select one or more PO IDs to subset query

Available: (all possible values) Rows 1 - 100

Selected: (all possible values)

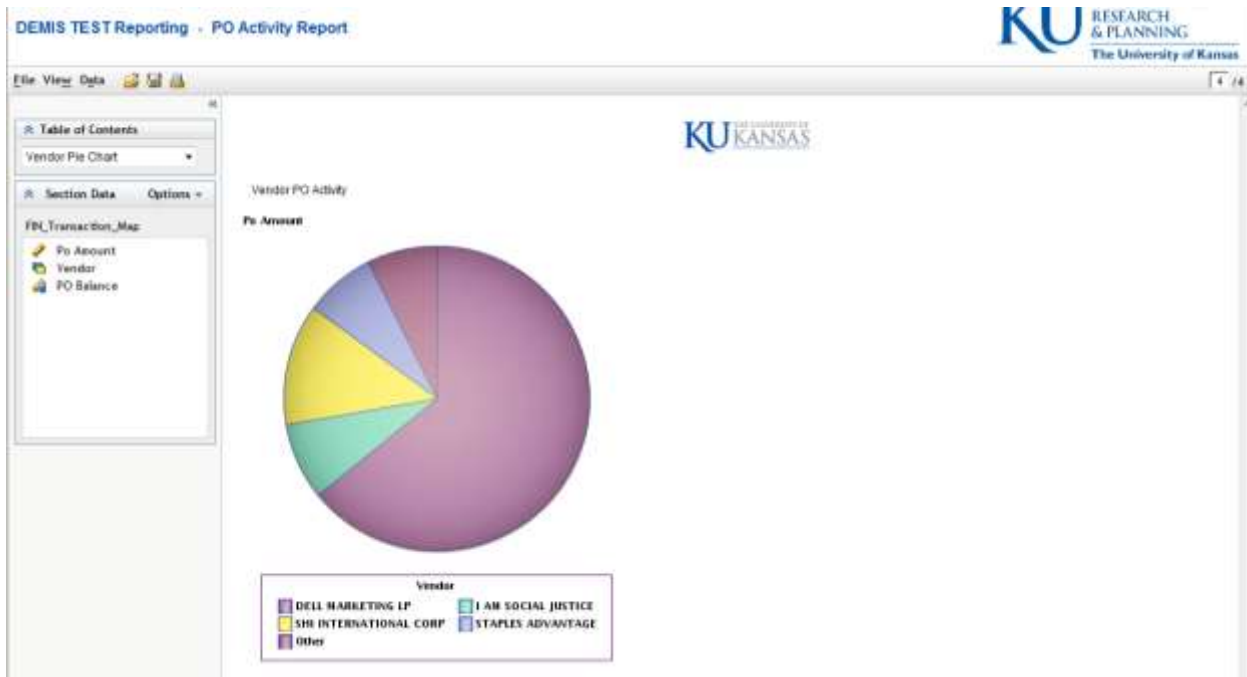
\* Vendor

Available: (all possible values) Rows 1 - 100

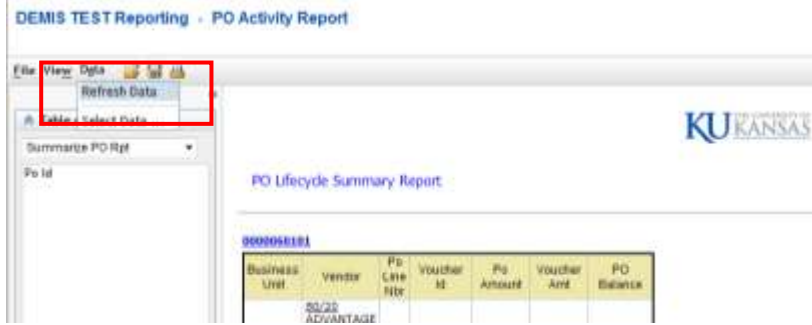
Selected: (all possible values)

View Report

Note: You do **not** have to make any additional selections in this section; you may just click the 'View Report' button at the bottom of the page.



5.) To refresh report's data *after* selecting Parameters: Select "Data" and "Refresh Data".

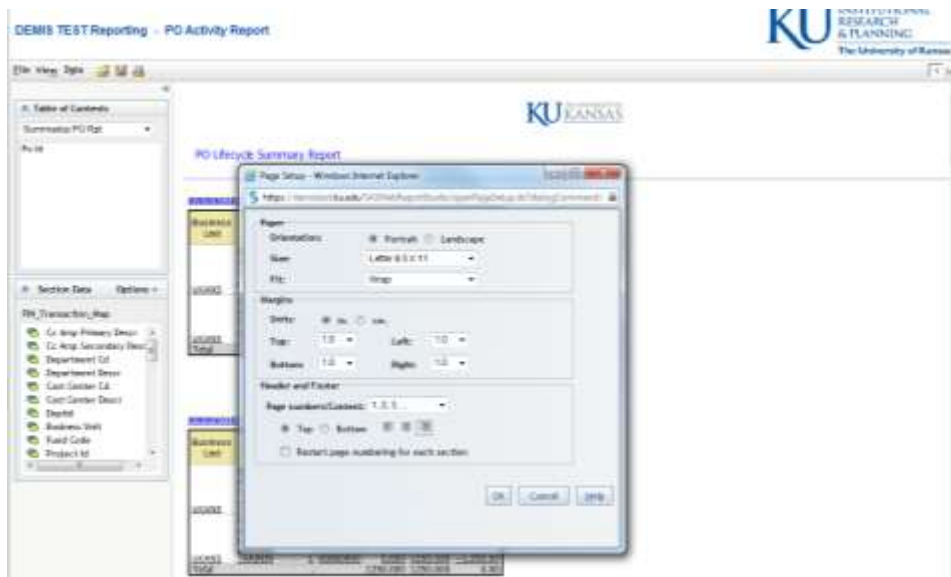


\*\* The refresh is related to the table of contents menu item selected. If you want to select new filters parameters, move to Select Parameters.

### Section III: Setting Print Options

Please note: the only output option is PDF. These are fixed format reports, as requested. To export or download data, please use regular DEMIS Financial reports.

1.) To adjust formatting for printing, select "File" "Page Setup"

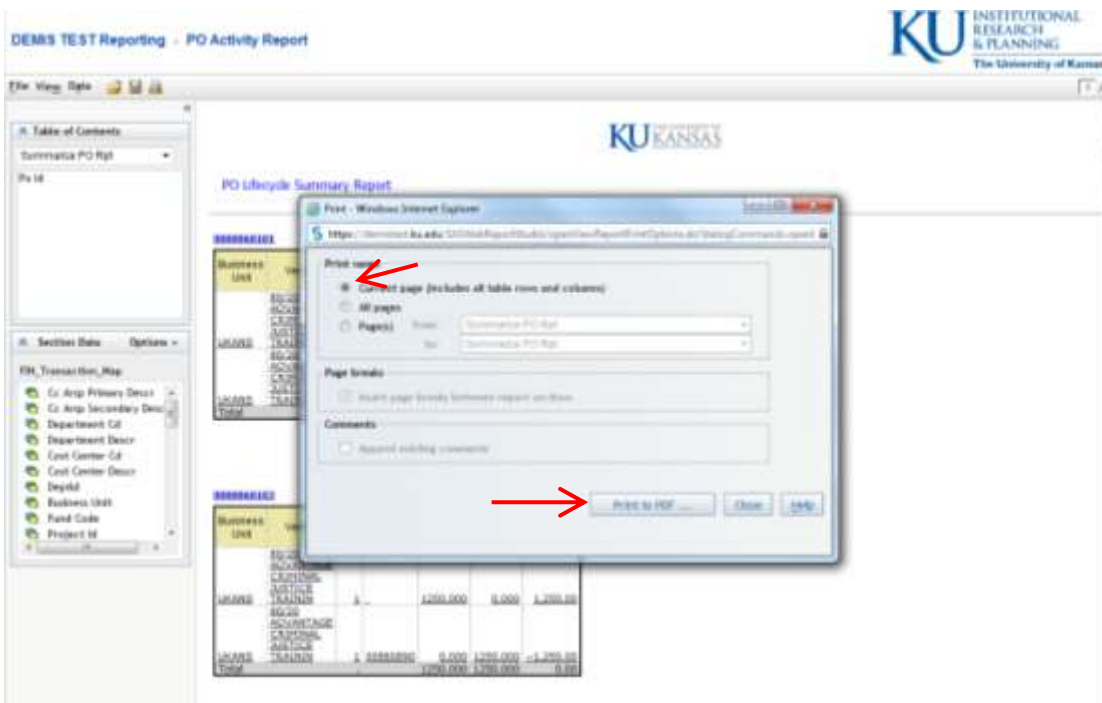




2.) To print, click on the printer icon. (Be sure to use the Report Menu bar and not the Browser menu bar.)



3.) The browser print window will popup. Leave the print range as it defaults, *Current page*, then click on the "Print to PDF"... button.



Note: An orphan *blank* browser window may open, then the PDF viewer will open. If you don't see the PDF window, look on you Windows task bar for the Adobe Icon and select it.



You will need to manually close the orphan browser window.