Buy@Duke Report Hints	
Check Functionality	Use of check functionality in the report selection criteria indicates correct format. If entry disappears , selection criteria is entered incorrectly
Cost Center Search	Use all capital letters to search by cost center text
Date Range	Use date format xx/xx/xxxx – xx/xx/xxxx. Include spaces before and after dash for date ranges.
Deletion Indicator	Displays in report results under Special Characteristics; indicates the filter on the report to not display deleted carts
Filter Functionality	Use * before and after text or number, then click the filter button or enter, search is not case sensitive
Fiscal Year Period Range	Enter fiscal period and fiscal year in format: period/year. For fiscal period ranges enter: period/year – period/year. Example 01/2013 – 03/2013. Include a space before and after dash.
Free Characteristics	Fields listed in free characteristics can be added as a column to the report results with the drag and drop feature
General Ledger Filter	Use * before and after number, then click the filter button or enter. Search is not case sensitive.
General Ledger Search	Use * before and after text then click the search button. Use all capital letters to search by general ledger text
Goods Receipt Flag	When this field is populated with an X, the cart was flagged for Non-Valuated Goods Receipt. If the field is blank, goods receipt was not required on the shopping cart
Org Unit Entry	The org unit number can be keyed directly in the report selection criteria or you can use the Org Unit Search feature
Org Unit Search	Use*before and after name, or partial name to ensure complete results or expand the org hierarchy to find correct org unit
Query Personalization	Changes to the standard view of the report can be saved and applied to future report results. See additional information below.
Refresh Query Option	This functionality is useful to run the same query with different criteria. This window shows the criteria values of the current report. New values can be entered to run a new report.
Report Availability	Buy@Duke Historical Reports are updated nightly between 12:00am and 6:00am. Report results can be affected during this time frame.
Responsible Person Search	Use * before and after name to ensure complete results. Use all capital letters to search by responsible person. If 2 names appear for the same person, select the one with the individuals' Duke id
Search Screen	Click on the white box in the corner of the Current Selection box or click in the Current Selection box and click the F4 key
Select Characteristics	Fields listed in select characteristics can be added as a column to the report results with the drag and drop feature

Buy@Duke Report Hints	
Sorting columns	Drag and drop the column you would like the report results sorted on to the far left to be in the first column of the report results, then the column can be sorted ascending or descending. The order of the columns is key in sorting.
Submitter Search	Use * before and after name to ensure complete results. Use all capital letters; if anticipated results do not display, use proper case. If 2 names appear for the same person, select the one with the individuals' Duke id
Variants	Frequently used selection criteria can be saved for future use. See additional information below
Vendor Number	Vendor number is the number for the remit address. This number may differ from the vendor number for ordering. Recommend searching by vendor name
Vendor Search	Use all capital letters and * before and after vendor name to ensure complete results. Search results columns sorted Vendor: Key (number) Vendor: Text (Name) Name 2: Key (Additional Vendor info) Name 3: Key (additional vendor info)
WBS Element Search	Use all capital letters Department project name is listed in column 3 of the search box

Buy@Duke Report Terms	
#	This symbol returns in report results when there is not a value in field to return in the report results
Approver Org Unit	Approver org unit in report comes from Bpartner. If an individual transfers positions, the new org unit will display in the reports. (Bpartner data originates from ECC Enterprise system R/3, SRM (Buy@Duke) and CRM development system.
Cart Creator	Individual who created the cart, can be a shopper or a submitter
Cart Level	Cart level number and a definition appear in the report results
Cart Processing Status - Held	Cart is saved
Goods Receipt	The name of the individual that completed electronic goods receipt in Buy@Duke
Goods Receipt Flag	Non-valuated goods receipt, X in the field indicates cart was flagged for goods receipt
Goods Recipient	The name of the individual (text entered in the Goods Recipient field) that the items purchased were shipped
Grant Manager	Grant Manager 1 in Master Data

Buy@Duke Report Terms

Item Status - FODC	Follow on document created
Item Status – Not Assigned	Purchase Order has not been created
Not Assigned	This text returns in report results when there is not text in field to return in the report results
Submitter Org Unit	Submitter org unit in report comes from Bpartner. If an individual transfers positions, the new org unit will display in the reports. (Bpartner data originates from ECC Enterprise system R/3, SRM (Buy@Duke) and CRM development system.
Responsible Financial Person	Responsible Financial Person 1 in Master Data
Shopping Cart Ordered	Shopping cart is submitted for approval.

How to Save a Query Variant

A query variant is a saved set of selection criteria that automatically populates the **General Variables** template. This feature saves time since the same query variables do not have to be entered each time you execute a query.

To save a variant, enter the selection criteria in the **Current Selection** column. Then click on the **Save As** button and enter a **Description** for the variant and click **OK**. Multiple variants may be saved.

If more than one personalization is set, click on the drop down arrow on the right-hand side of the **Available Variants** to select a variant.

NOTE: Values may still be entered directly into the Current Selection columns.

Query Personalization

If you make any changes to the standard view of the report, the revised view can be saved by clicking on **Query Personalization** and selecting **Personalize Query**.

Each time you run the report in the future, your revised view will appear.

If you wish to return to the standard view, select **Delete Personalization**.

How to Add Subtotals in Report Results

Right click on column title, select Properties, then Characteristic. On the General tab, click the drop down arrow for Display Results and change from Never to Always. Click OK.

Note: Order of columns is extremely important. Report data is sorted from left to right. For example: If the *Item #* Column is before the *Cart* column, the report will sort by *Item #* first and then by *Cart*. Therefore, the report results will not appear as intended. To prevent this from occurring, move the *Cart* column to the left of the *Item #* column.

Another option for adding subtotals: Export report to Excel and use Excel subtotal functionality.

Back/Undo Functionality

If the report results have been modified by moving columns or adding subtotals and you would like to undo the last change or revert back to the standard report results, right click in the body of the report results and select Back, the select either Back One Navigational Step or Back to Start.

Report Security

If unable to access the Buy@Duke reports on the Reports section on the Buy@Duke tab, check to ensure that duke.edu is listed as a trusted site. If it is and you are still unable to access the reports, add bjp.duke.edu to the list of trusted sites.