Custom Historical Buy@Duke Reports

Data in these reports is refreshed nightly

*Required Field

FAM: All Carts Ordered

Summary	This query shows the details of all carts ordered, including the organization unit of the submitter and approver.		
Primary Users	Administration Business Office		
Suggested Use	Review submitter and approver org unit to identify carts submitted or approved from outside your org unit and charged to cost objects in your org unit		
Selection Criteria	Cost Object Date Range Dollar Range* Financial Responsible Person General Ledger Account	Grant Manager Org Unit of Cost Object Responsible Person Submitter	
Report Results	Approver Accounting Information Cart Information Dollar Value Financial Responsible Person Goods Receipt Grant Manager Item Information	Org Unit of Approver Org Unit of Cart Creator Org unit of Cost Object Org unit of Submitter Purchase Order Information Responsible Person Submitter Vendor	

FAM: Purchases Automatically Approved

Summary	This query shows carts under the business unit threshold and carts where the submitter is also the approver; carts processed without front end controls.		
Primary Users	Administration Business Office		
Suggested Use	Review carts processed with automatic approval; carts under purchasing limit and without departmental approval		
Selection Criteria	Cost Object Date Range Dollar Range* Financial Responsible Person General Ledger Account	Grant Manager Org Unit of Cost Object Responsible Person Submitter	
Report Results	Accounting information Cart information Dollar Value Financial Responsible Person Goods Receipt information	Grant Manager Item information Org Unit of Cost Object Purchase Order information Responsible Person	

Carts Pending Approval

Summary	This query shows carts that are pending approval. Carts displayed can be pending approval at department or institutional level.
Primary Users	Business Office Buy@Duke users
Suggested Use	Identify carts in the approval process and awaiting approval
Selection Criteria	Cost Object Cart Status Date Range Dollar Range*	Org Unit of Cost Object Responsible Person Submitter Vendor
Report Results	Approver Cart Information Cost Object Dollar Value General Ledger Account Item information Org Unit of Approver	Org Unit of Cost Object Responsible Person Special Needs Status (Cart and Approver) Submitter Vendor
Note	Cart level displays the current approval level for all approvers. Once the cart moves to the next level, the report will display the next approval level. For example: A cart requires Level 5 – DLAR approval and Level 8 – Procurement approval. When the cart is awaiting Level 5 approval, all in the cart approval process will show a cart level of 5, including individuals in Procurement. When the cart is approved by DLAR and routed to Procurement, the cart level will display level 8 for all in the approval process, including individuals in DLAR.

Item Not Yet Received

Summary	This query shows carts requiring goods receipt.
Primary Users	Business Office Buy@Duke users
Suggested Use	Identify carts that Goods Receipt has not been completed
Selection Criteria	Cart Status Cost Object Date Range	Org Unit of Cost Object Submitter Vendor
Report Results	Accounting Information Cart Information Item Information Org Unit of Cost Object Purchase Order Information Quantity Confirmed	Quantity Ordered Vendor Ability to add following fields: Cart and Purchase Order Status Purchase Order Date Submitter

Detail by Submitter

Summary	This query shows cart details by Submitter.
Primary Users	Administration Business Office
Suggested Use	Review cart information by Submitter
Selection Criteria	Approval Status Cost Object Cart Status Date range Dollar Range*	General Ledger Account Org unit of Cost Object Responsible Person Submitter Vendor
Report Results	Accounting Information Cart Information Delivery Information Dollar Value General Ledger Account Goods Receipt information Item Information	Purchase Order Information Responsible Person Submitter Vendor Ability to add following fields: Approver Status
Note	Some cart items will display amount multiple times. This report combines cart header data with item data. The number of times the amount appears reflects the number of times that the cart was approved. If you move the approver column into the report from Free Characteristics, it will display the approvers.

Report on Purchase History

Summary	This query shows cart purchasing details.
Primary Users	Administration Business Office Buy@Duke users
Suggested Use	Review Buy@Duke purchase history
Selection Criteria	Cost Object Date range Dollar Range* Org Unit of Cost Object	Responsible Person Submitter Vendor
Report Results	Accounting Information Approver Cart Information Goods Receipt Flag Item Information Org Unit of Approver	Org Unit of Cost Object Purchase Order Number Responsible Person Status (Cart and Approver) Submitter Vendor Information

Vendor Activity Report Buy@Duke Only

Summary	This query shows the Buy@Duke spend by vendor.
Primary Users	Business Office Buy@Duke users Procurement
Suggested Use	Review Buy@Duke orders by vendor

Selection Criteria	Fiscal Period** Company Code Cost Object Date Range** Dollar Range*	General Ledger Account Material Group Org Unit of Cost Object Responsible Person Vendor
Report Results	Accounting information Cart information Fiscal year/period Item information Material Group Org Unit of cost object	Purchase order information R/3 Doc. Number R/3 Reference Responsible Person Vendor information
Note	** Entering Fiscal Period or Date range optimizes report performance To include credits and changes to Purchase Orders, change Dollar Range to include negative amounts Recommend using the search feature to locate the vendor number. Vendor number in this report is the vendor number for the remit address.	

Time to Approval

Summary	This query shows the timeframe between cart submission for approval and cart approval at each approval level.
Primary Users	Administration Business Office
Suggested Use	Review the time between cart submission and approval and the time between departmental approval to institutional approval

Selection Criteria	Org unit	Cart date range
Report Results	Accounting Information Approval Date and Time Approver Cart Information Goods Receipt Flag	Material Group Purchase Order Date Special Needs Vendor
Note	Approval start date and start time resets and begins as new when a cart is resubmitted	

Carts Requiring Institutional Approval

Summary	This query shows carts that required institutional approvals.
Primary Users	Administration Business Office
Suggested Use	Review carts that required institutional approval

Selection Criteria	Date Range Material Group Org Unit of Cost Object	Responsible Person Vendor
Report Results	Approver Cart Information CAS Number Delivery Information Dollar Value Goods Receipt information Item Information	Material Group Org Unit of Approver Org Unit of Cost Object Purchase Order Number Vendor Ability to add following field: Responsible Person

Department Approver Workload Measure

Summary	This query shows statistical information on the number of carts and line items approved by an individual business unit approver.
Primary Users	Administration Business Office
Suggested Use	Review approver workload

Selection Criteria	Date Range	Org Unit of Cost Object
Report Results	Approver Approval Status Cart Volume	Line Item Count Org Unit of Cost Object
Note	Reports displays time to approval by Approver. To view time to approval by cart and display cart workflow, drag and drop the cart column into the first column position.

Shopping Carts with CAS Numbers

Summary	Shopping carts with CAS Number
Primary Users	Business Office Buy@Duke users Occupational & Environmental Safety Office
Suggested Use	Review carts with CAS items ordered

Selection Criteria	Cart Date Range Org Unit of Cost Object	Submitter Vendor
Report Results	Cart Creator Cart information CAS Number Item information Org Unit of Shopper	Purchase Order Number Status (Cart) Submitter Vendor information

Shopping Carts with Chemicals of Interest

Summary	Shopping carts with Chemicals of Interest
Primary Users	Business Office Buy@Duke users Occupational & Environmental Safety Office
Suggested Use	Review carts with Chemical of Interest items ordered

Selection Criteria	Cart Date Range Org Unit of Cost Object	Submitter Vendor
Report Results	Cart Creator Cart information CAS Number Item information Org Unit of Shopper	Purchase Order Number Status (Cart) Submitter Vendor information

Procurement Report by Cart

Summary	This query shows purchasing details by cart.
Primary Users	Procurement
Suggested Use	Review cart information by Cart number

Selection Criteria	Cost Object Date Range Dollar Range* General Ledger Account	Org Unit of the Cost Object Processing Status - Cart Status Submitter
Report Results	Accounting Information Approval Date and Time Approver Cart Information CAS Number Delivery Information Goods Receipt Information Item Information Material Group	Org Unit of Cost Object Org Unit of the Submitter Purchase Order Information Responsible Person Special Needs Status (Cart and Item) Submitter Vendor Information

Procurement Report by PO

Summary	This query shows purchasing details by purchase order.
Primary Users	Procurement
Suggested Use	Review cart information by Purchase Order

Selection Criteria	Cost Object Date range Dollar range* General Ledger Account	Org unit of Cost Object Status Submitter
Report Results	Accounting Information Approval Date and Time Approver Cart Information CAS Number Delivery Information Goods Receipt Information Item Information Material Group	Org Unit of Cost Object Org Unit of the Submitter Purchase Order Information Responsible Person Special Needs Status (Cart and Item) Submitter Vendor Information

Standard System Historical Buy@Duke Reports
Data in these reports is refreshed nightly
*Required Field

Shopping Cart Details

Summary	This query shows an overview of the individual items and account assignments for a selected shopping cart.	
Primary Users	Business Office Buy@Duke users	
Suggested Use	Review individual items and account assignments for a selected cart	
Selection Criteria	Cart Number*	Date Range
Report Results	Cost Object Date Item Number Processing Status Product Description Quantity Value	Ability to add following fields: Accounting Information CAS Number Org Unit Status

Shopping Carts per Material Group

Summary	This query shows an overview of the carts for a selected material group.	
Primary Users	Administration Business Office Buy@Duke users	
Suggested Use	Review carts for a selected material group	
Selection Criteria	Cost Object Creation Date General Ledger Account Material Group	Owning Org Unit Product Description Requesting Org Unit Submitter
Report Results	Cart Number Creation Date Material Group Net Amount Quantity Requester/Submitter Transaction Description	Ability to add following fields: Accounting Information CAS Number Org Unit Product Information Vendor

Shopping Carts per Funding Source

Summary	This query shows the account assignment of the cart; cost object and G/L account.
Primary Users	Administration Business Office Buy@Duke users
Suggested Use	Review carts coded to a cost object

Selection Criteria	Cost Object Created On General Ledger Account Owning Org Unit	Product Description Requesting Org Unit Submitter
Report Results	Accounting Information Product Information Requester/Submitter Status Vendor	Ability to add following fields: Cart Number CAS Number Org Unit

Shopping Carts per Catalog

Summary	This query shows an overview of the carts created from a selected catalog.
Primary Users	Administration Business Office Buy@Duke users
Suggested Use	Review carts created from a selected catalog

Selection Criteria	Cost Center Created On Owning Org Unit Product Description	Requesting Org Unit Submitter Vendor
Report Results	Cart Information Item Information Quantity Status Vendor	Ability to add following fields: CAS Number Org Unit Requester/Submitter

Standard System Real Time Reporting
Data in these reports is current and reflects real time activity and status

Shopping Cart Status

Summary	Identify the status of a cart	
Primary Users	Business Office Buy@Duke users	
Suggested Use	Review cart status	
Selection Criteria	Cart Name Cart Number Creation Date Process Type	Requester/Submitter Status Timeframe
Report Results	Cart Name Cart Number Creation Date	Status Total Value

Shopping Cart Details

Summary	Identify cart items and status	
Primary Users	Business Office Buy@Duke users	
Suggested Use	Review cart details and research carts	
Selection Criteria	Account Assignment Element Account Assignment Type Cart Name Cart Number Creation Date	Item description Product Category Requester/Submitter Status Timeframe
Report Results	Ability to click through to the Cart Cart Number Description	Line Number Product Status

Purchase Order Status

Summary	Identify the status of a Purchase Order
Primary Users	Business Office Buy@Duke users
Suggested Use	Review Purchase Order status
Selection Criteria	Company Code Creation Date Process Type Purchasing Group Purchase Order Name	Purchase Order Number Purchasing Organization Status Supplier Timeframe
Report Results	Ability to click through to Purchase Order Purchase Order Name Purchase Order Number Status	Supplier ID Supplier Name

Purchase Order Details

Summary	Identify items and account assignment for a Purchase Order
Primary Users	Business Office Buy@Duke users
Suggested Use	Review Purchase Order details and research Purchase Orders
Selection Criteria	Account Assignment Category Account Assignment Value Creation Date Item Description Product Category Product ID	Purchase Order Name Purchase Order Number Status Supplier ID Timeframe
Report Results	Ability to click through to Purchase Order Created Date and Time Item Number	Purchase Order Name Purchase Order Number Status