Purchasing Activity Register

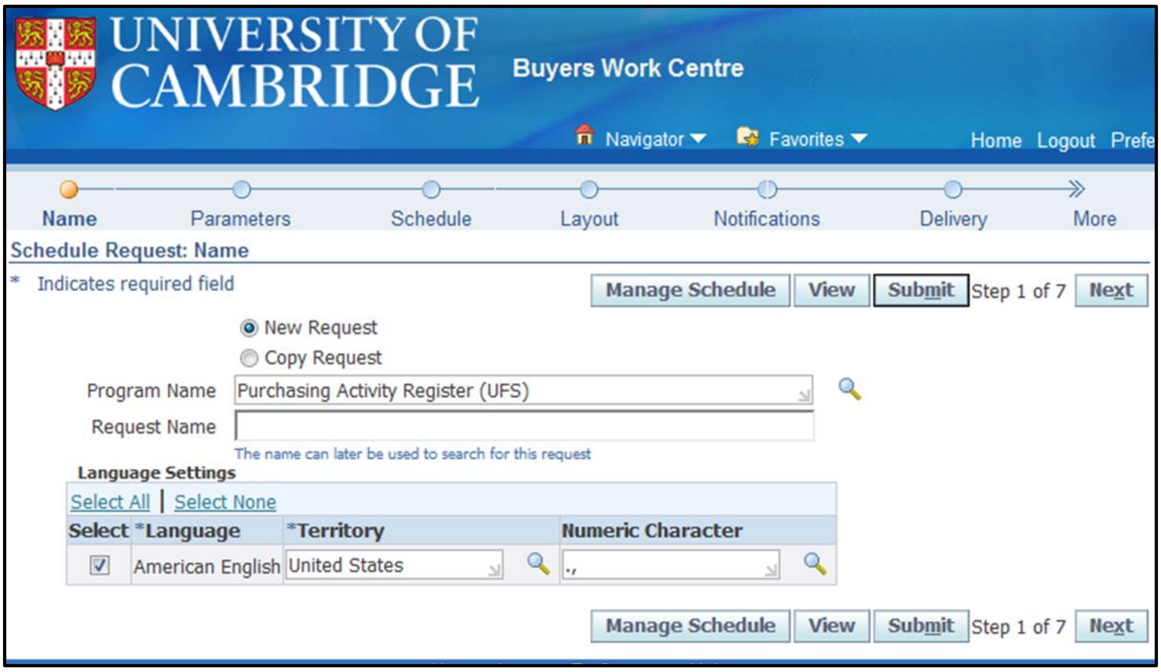
The *Purchasing Activity Register* report allows departments to analyse their expenditure. The report can be used to provide information over a specified date range, and/or for a particular supplier, and/or for a particular Buyer within the department.

The report lists all matching purchase orders where there is a commitment or an actual expense (i.e. it includes incomplete orders but not cancelled ones).

Step 1: Selecting the report

Navigate **Buyers Work Centre > Requests**

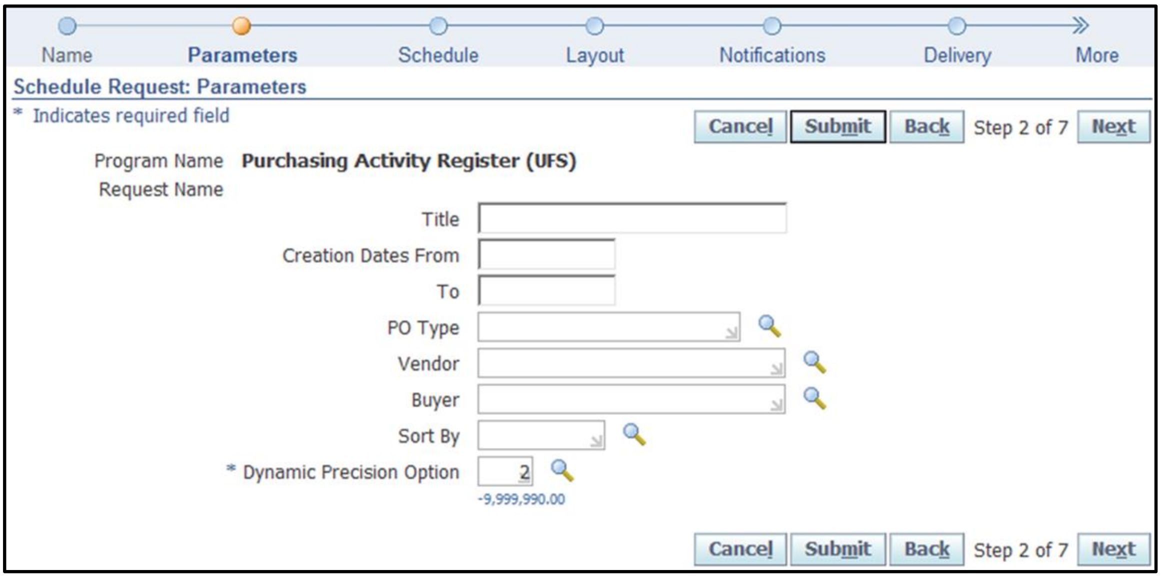
1.1 Click in the **Program Name** field and type in **Purchasing** and then press tab. The **Purchasing Activity Register (UFS)** report should now automatically select.



1.2 Now click **Next** to enter specific parameters.

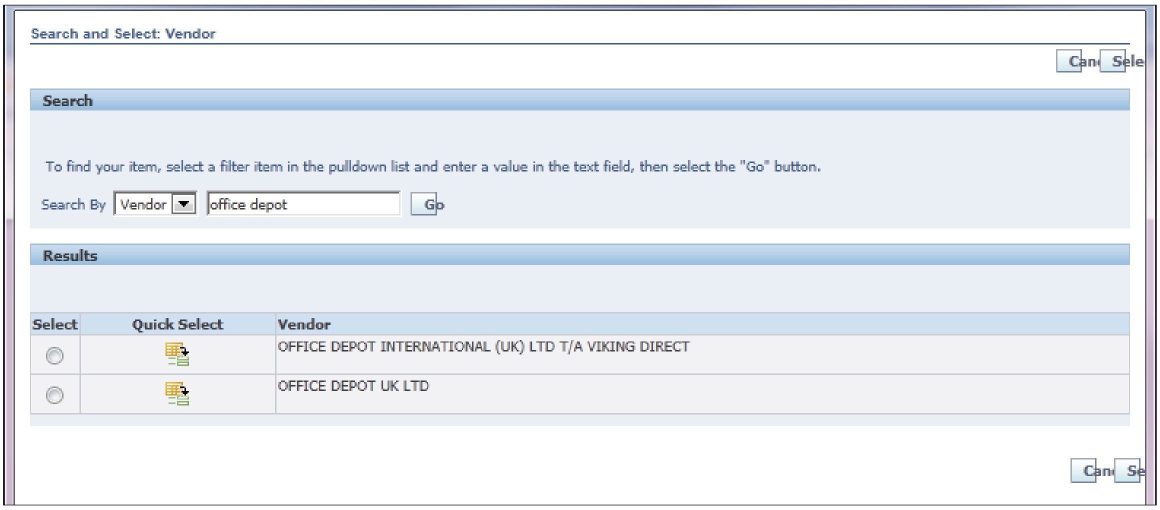
Step 2: Entering parameters

You can enter any relevant parameters, such as a date range, specify a particular buyer or specify a particular vendor.



2.1 To constrain your report to a particular date range, use the **Creation Dates From** and **To** fields. There is no calendar to use to select dates, so note that dates should be in the format DD-MMM-YY (e.g. 6-APR-14).

2.2 The **Vendor** field can be used to report on expenditure with a particular vendor. To specify a vendor, enter a partial name and then press tab. You can Quick Select your supplier from the list of matching suppliers.



2.3 To search for expenditure incurred by a particular Buyer, enter the Buyer’s surname into the Buyer field and press tab. If necessary, **Quick Select** the **Buyer** from the list of matches.

2.4 Now press **Submit** to skip ahead to step 7 and finalise your request.

Note: steps 3-5 in creating a request provide you with access to advanced features such as scheduling reports and automatically notifying users when reports are complete.

Step 7: Review and submitting the request

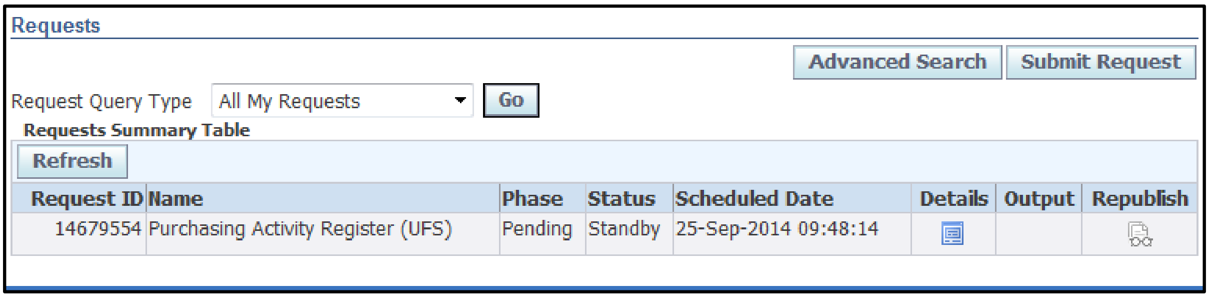
Information on this screen will summarise what you have entered on the previous steps.

If you have not progressed through each step, once at this screen we recommend that you click **Back** to go to step 6 and amend your copies from 1 to 0 to review the report on screen before printing.

Information on this screen will summarise what you have entered on the previous steps.

7.1 Click **Submit** and an information message will display.

7.2 Click **OK** and your Request screen will display. Click **Refresh** to update the Phase and Status of the request.



Viewing the Report

Click on **Output** and the report will display on your screen.

The report lists purchase orders by date, along with the value of the commitment or actual expenditure.

An example output of this report is on the next page.

CAPSA Set of Books | Purchasing Activity Register (UFS) | Report Date: 16-FEB-2016 10:35

Report Parameters

Creation Dates From :
To :
PO Type :
Vendor :
Buyer : Peck, Mrs Margaret
Sort By :

CAPSA Set of Books | Purchasing Activity Register (UFS) | Report Date: 16-FEB-2016 10:35
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Creation Date	PO Number - Release	Buyer	PO Type	Vendor	Currency	PO Amount	Functional Amount
16-JUN-09	1065799	Peck, Mrs Margaret	Standard Purchase Order	UNIVERSITY OF EAST ANGLIA	GBP	594.00	594.00
							594.00
12-NOV-09	1123078	Peck, Mrs Margaret	Standard Purchase Order	BIOCHEMISTRY	GBP	57.70	57.70
							57.70
17-NOV-09	1124725	Peck, Mrs Margaret	Standard Purchase Order	OFFICE DEPOT UK LTD	GBP	0.84	0.84
							0.84
03-MAR-10	1164668	Peck, Mrs Margaret	Standard Purchase Order	SIGMA-ALDRICH CO LTD	GBP	8,000.00	8,000.00
							8,000.00
04-MAR-10	1165004	Peck, Mrs Margaret	Standard Purchase Order	SYSTEM INSIGHT	GBP	1,700.82	1,700.82
							1,700.82
15-MAR-10	1168270	HAWTIN, Mr. Del Del	Standard Purchase Order	INFORMATION SERVICES	GBP	32.00	32.00
	1168271	HAWTIN, Mr. Del Del	Standard Purchase Order	BIOCHEMISTRY	GBP	486.90	486.90
							518.90