

PeopleSoft IR-#13

Enterprise-Wide PeopleSoft Crystal Inventory Reports

Scope:

This PeopleSoft Information Release (IR) applies to Enterprise-wide PS Purchasing Inventory Buyers and PS Inventory Managers/Supervisors.

Purpose:

The purpose is to provide Crystal Reports on Inventory Purchase Orders and Inventory Receipts in order for End-Users to successfully manage Inventory Encumbrances as well as Inventory Stock Levels.

Module:

The IR affects the Purchasing and Inventory Modules in Financials Reporting.

Source:

The source of this IR is a result of a Business Policy.

Procedures

Parameters – The following must exist for this procedure to be successful:

Database: PS Financial Reporting (PSFSRPT)

Security Access: Possess Security Access to PSFSRPT

Navigation & Process Overview

Three reports are identified in this IR for an Inventory End-User (at any level) to Run, View, Print, and Analyze. Each will be discussed in its entirety.

1st. Report [Inventory Orders Not Received](#)

2nd. Report [Inventory Open PO Report](#)

3rd. Report [Inventory Receipts Outstanding By Item](#)

4th. Report [Inventory Receipts Outstanding By Item - Short](#)

Retrieval Name: Information Release - #13
Issue Date: March 18, 2004
Revision Date:
Originator: Financial Support Organization
Rescind Date:

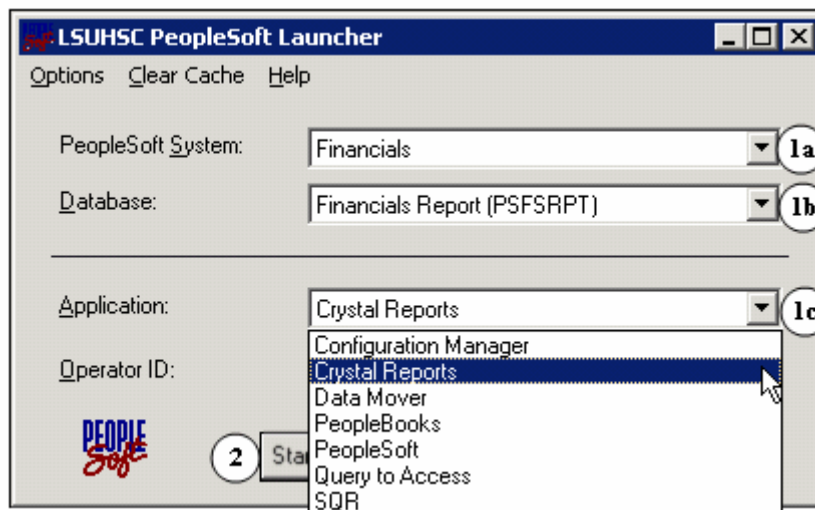



Report #1: Inventory Orders Not Received.

- [Access & Run the Inventory Orders Not Received Report](#)
- [Viewing the Inventory Orders Not Received Report](#)
- [Printing the Inventory Orders Not Received Report](#)
- [Analyze the Inventory Orders Not Received Report](#)

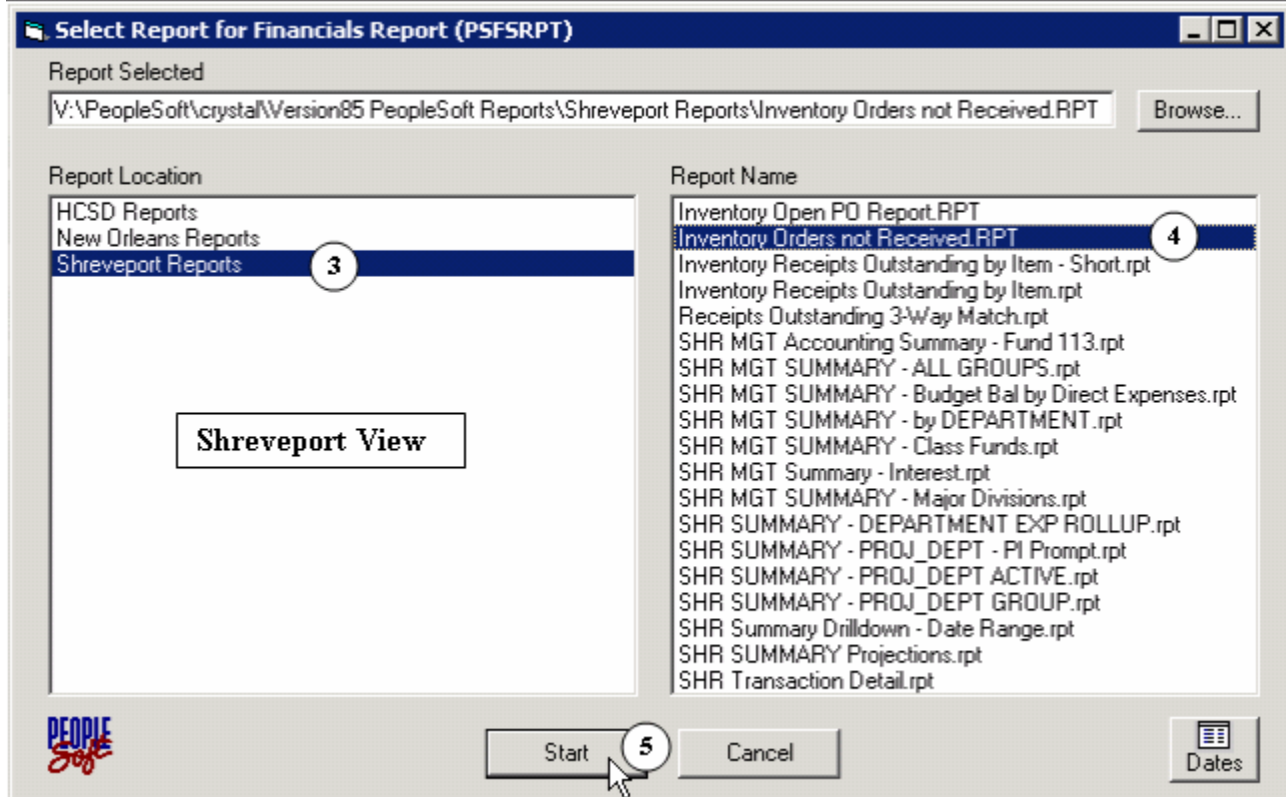
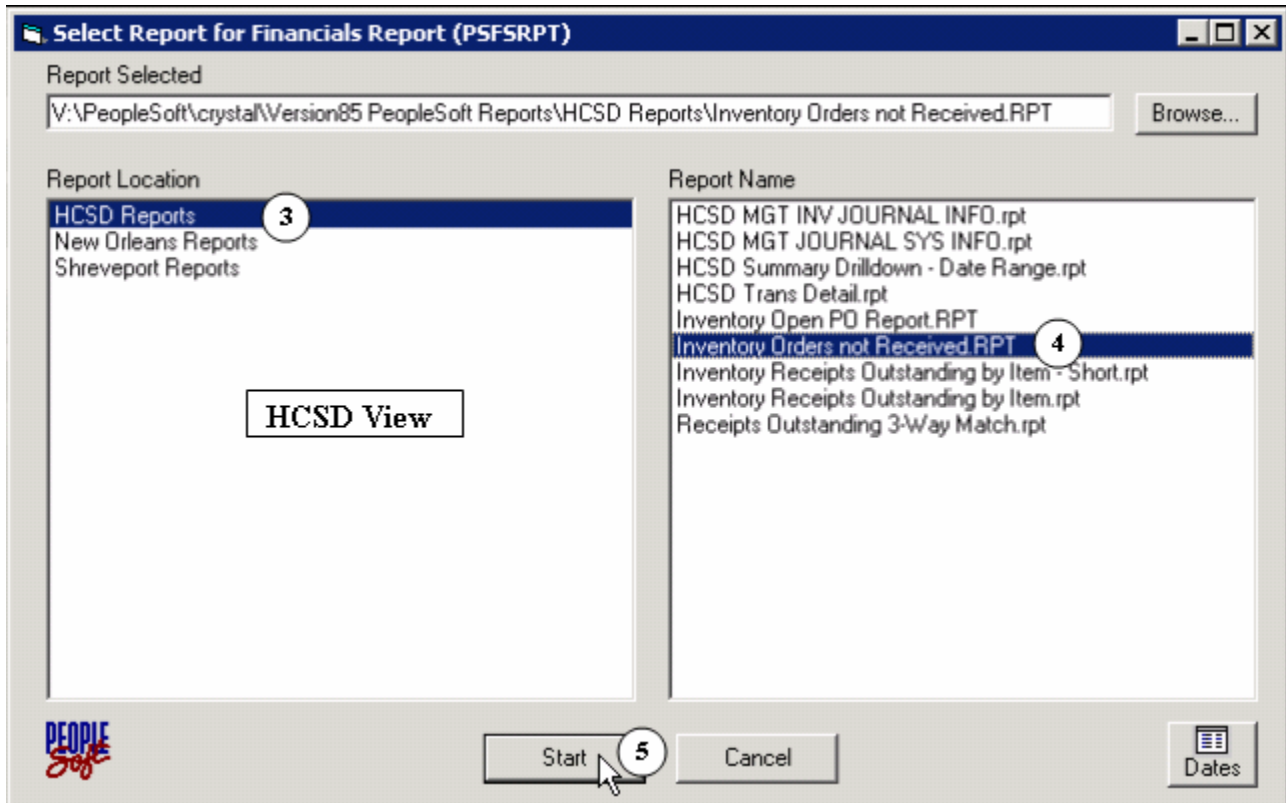
Navigation & Process


Accessing & Running the Inventory Orders Not Received Report



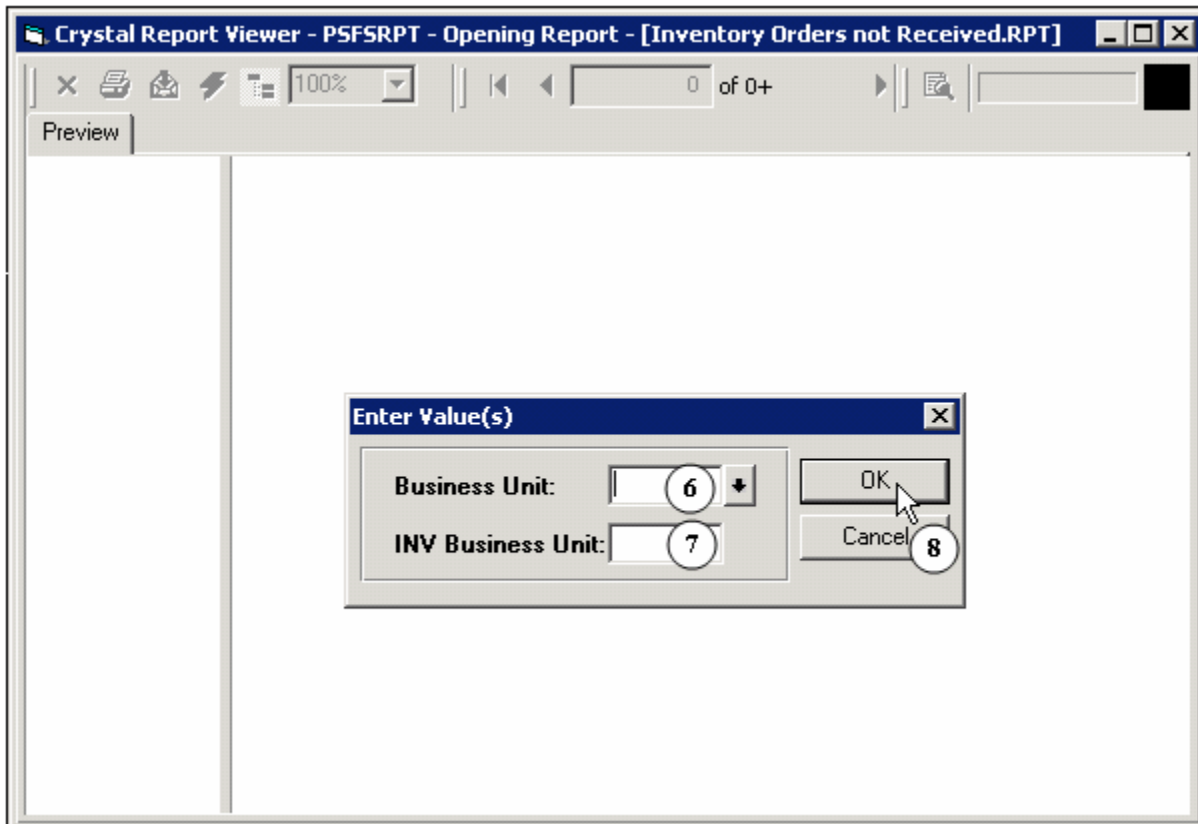
Step	Action
1.	From the LSUHSC PeopleSoft Launcher Select: <ul style="list-style-type: none"> a. PeopleSoft System: <i>Financials</i> b. Database: <i>Financials Report (PSFSRPT)</i> c. Application: <i>Crystal Reports</i>
2.	With all the proper selections made, Click the  button.


The **Select Report for Financial Report (PSFSRPT)** dialog box displays.



Step	Action
3.	From the Report Location : Select <i>HCSD Reports</i> or <i>Shreveport Reports</i>
4.	From the Report Name : Select <i>Inventory Orders Not Received</i>
5.	With all the proper selections made, Click the  button.

The **Crystal Report Viewer** window displays.



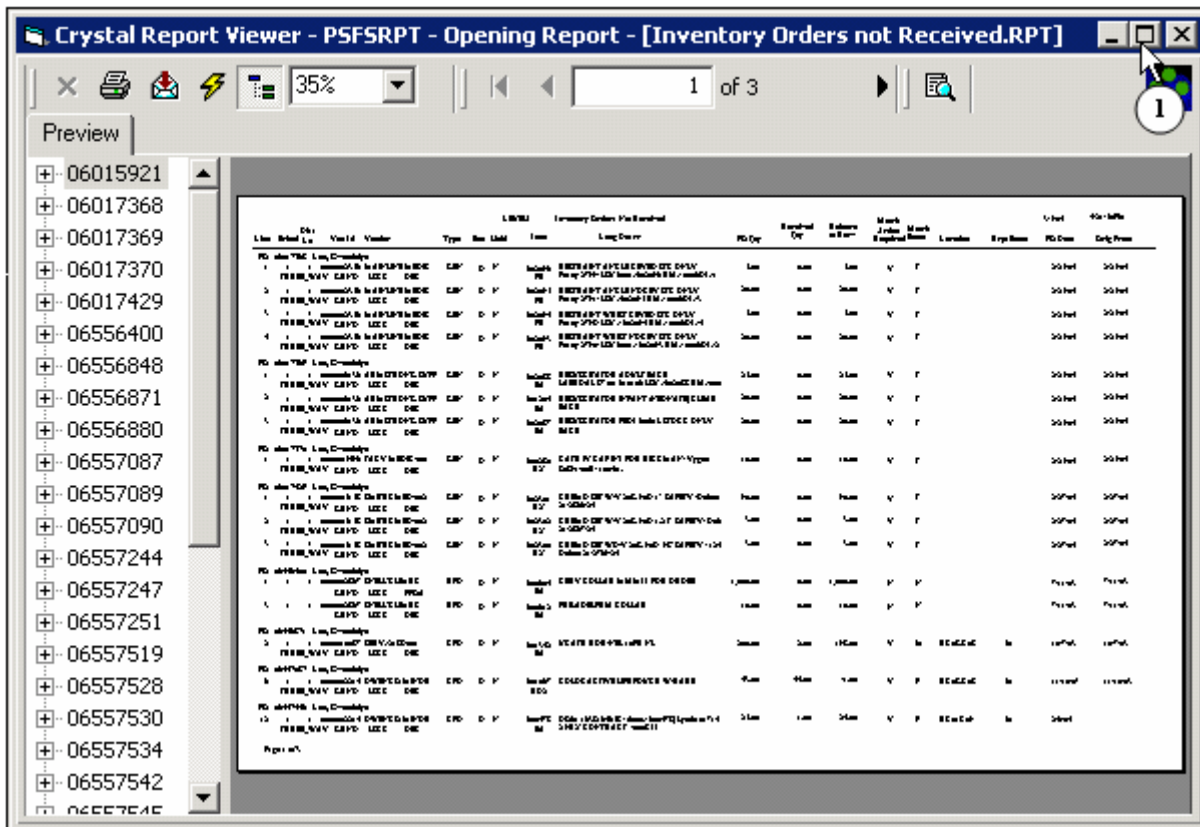
Step	Action
6.	Enter or Select Business Unit : <i>Appropriate Purchasing BU</i>
7.	Enter the INV Business Unit : <i>Appropriate Inventory BU</i>
8.	With all the proper selections made, Click the  button.


Continue with **Viewing the Inventory Orders Not Received Report** section.

Viewing the Inventory Orders Not Received Report

The Crystal Report Viewer with the Inventory Orders Not Received Report displays.

Since the report is at a less than optimal size for viewing, several features of the Crystal Report Viewer window will be discussed. All of following features may serve the End-User in viewing, printing, refreshing, or simply moving around several pages with ease. The focus of this section will be on buttons found at the top of the Crystal Report Viewer. In addition, the functional use of the Preview tab will be discussed.














Step	Action
1.	<p>It is essential to make use of the maximum use of the viewing screen available, therefore:</p> <p>Click:  the Maximize button on the Title bar</p>

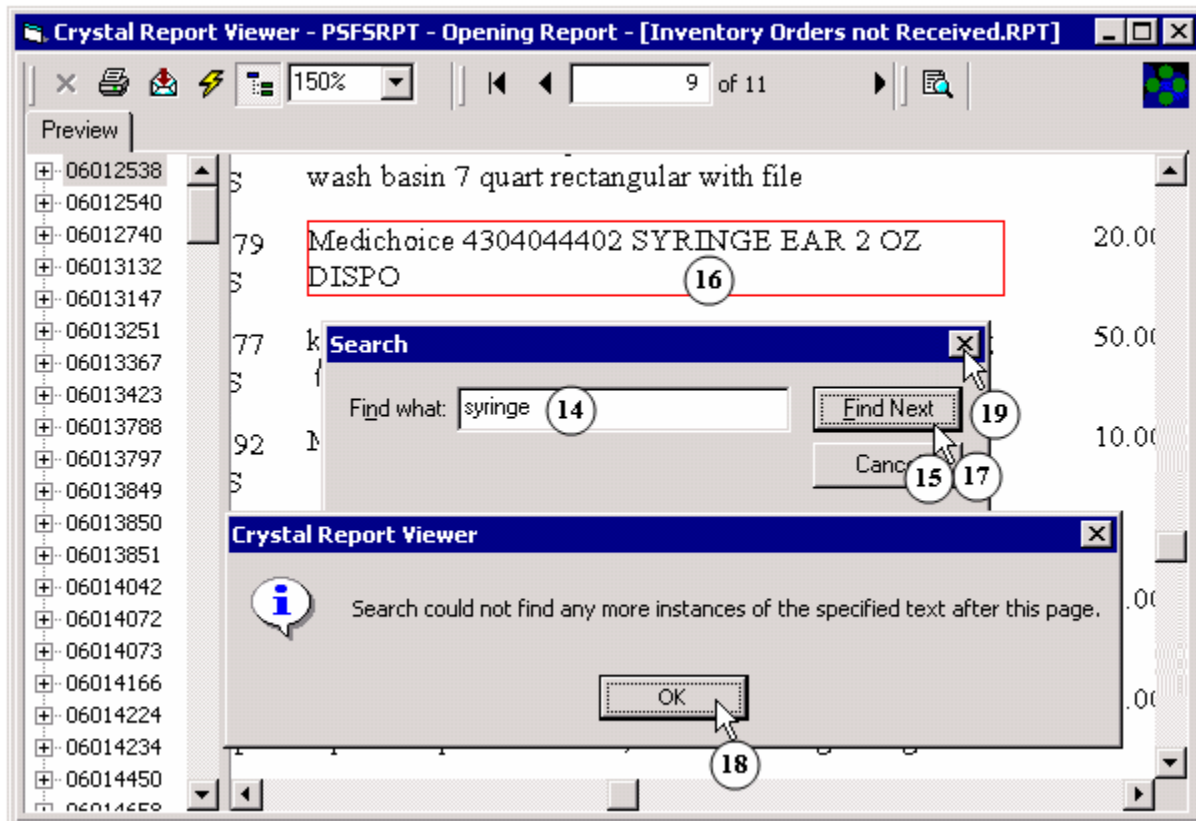
Discussion will continue with the series of Icons (buttons) located at the top of the Crystal Report Viewer window.




The Crystal Report Viewer Icons





Step	Action
2.	Click  Print Report button to initiate the print options for a Report. This button will be discussed in detail in the next section.
3.	Click  Export Report button to save a copy of a report to an Acrobat Format (PDF) file and save a single or multiple pages of the report
4.	Click  Refresh button to run the similar report currently viewing but for either a different Business Unit and/or INV Business Unit without closing the Crystal Report Viewer window.
5.	Click  Toggle Group Tree button to hide the Preview tab. Turning this button off (on by default) will present a full window display of any report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.
6.	Initially the report is displayed in a viewing percentage less than 100% Click in  Zoom box to enter any (larger) percentage value so to "zoom in" to get a close-up view of your document or (less)"zoom out" to see more of the page at a reduced size. Or Click the arrow next to the Zoom box and Click the zoom setting you want to either enlarge or reduce to a value other than the current percentage viewing.
7.	Click  Go To First Page button when on any page past the first page of a multi-page report to return to the first page of the report.
8.	Click  Go To Previous Page button to view the previous page from the current page displayed.
9.	Click in  Page Number box to enter and view a specific page of a multi-page report. Type a value in the box and Press Enter key and said page of report will display.
10.	Click  Go To Next Page button to view the next page from the current page displayed.
11.	Click  Go To Last Page button when on any page of a multi-page report to return to the last page of the report.

Step	Action
12.	Click  Stop Load button if necessary to stop a report from loading after entering Business Unit and INV Business Unit values. Not available after report displays.



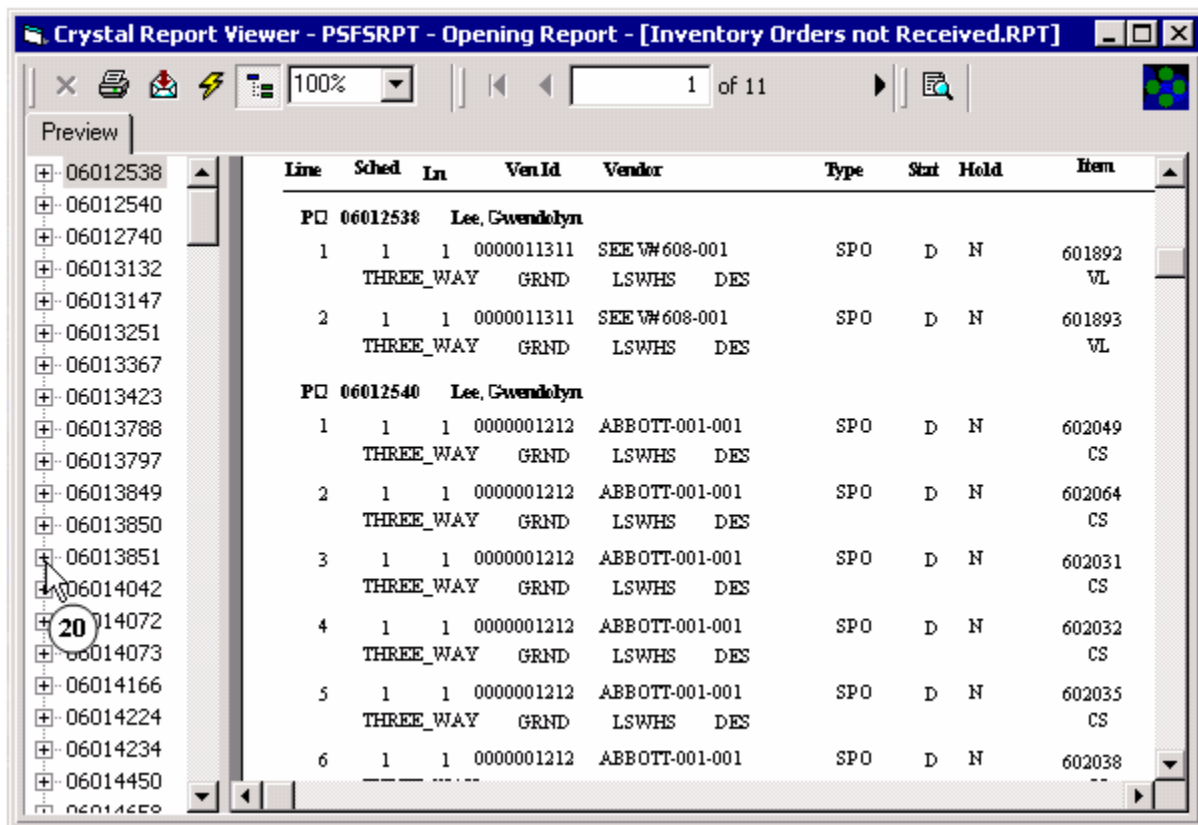
Step	Action
13.	Click  Search Text button to display a Search dialog box and find any item (alpha or numeric) within the report.
14.	Enter Find what entry in the Search box. Value(s) entered are not case-sensitive.
15.	Click  to begin the search process.
16.	The text will be located on any page of the report and will appear within a Red Box .
17.	Click  repeatedly to continue displaying similar entries found in the report.




Step	Action
18.	When no further entries can be located in the report, an Information box displays. Click  to close Information box
19.	Click  Close button located on top right of Search dialog box to return to report viewing.

The next discussion will focus on utilizing the **Preview** tab of the **Crystal Report Viewer**.

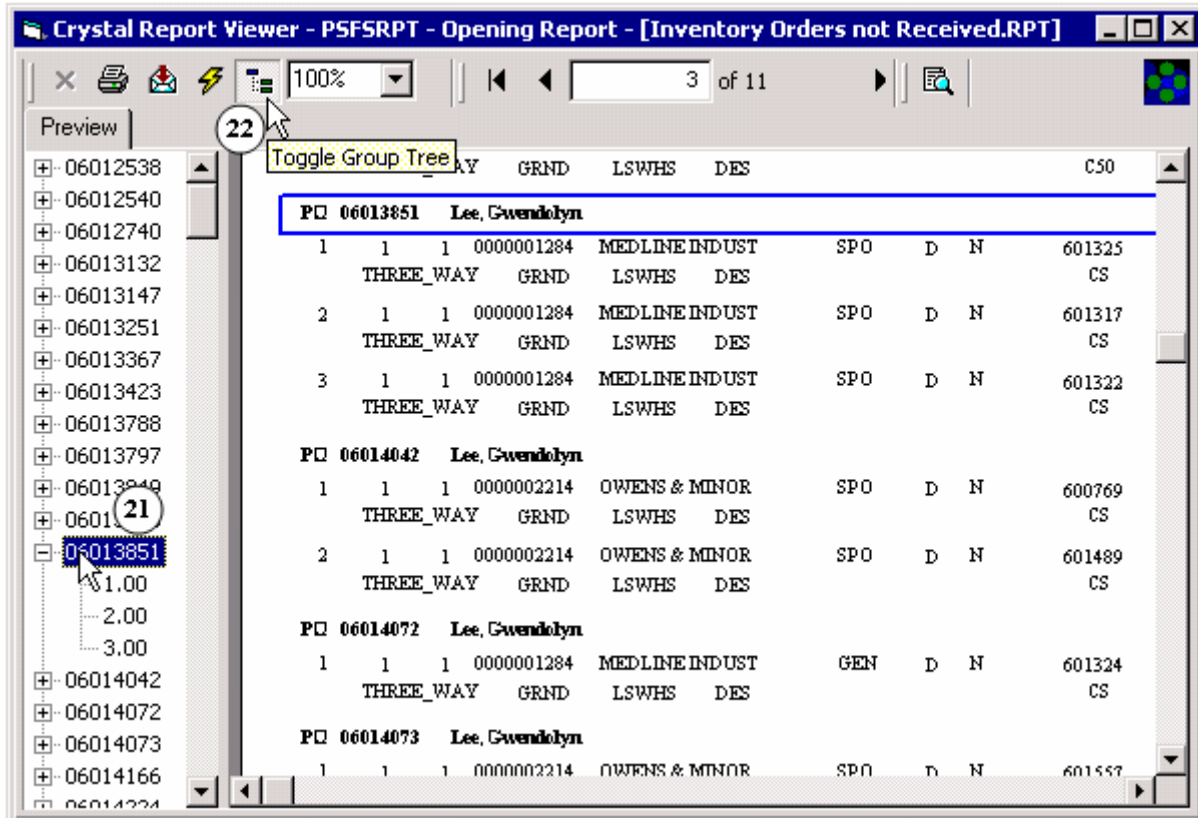
If the need arises to focus on one specific Purchase Order (PO) of the report and on a specific associated PO Line, then the **Preview** tab will prove to be a time saver as opposed to viewing each page of the report until the PO is located. As an example, the following will illustrate the steps in locating and viewing the specific **PO 06013851 Line 3**.


Before:



Step	Action
20.	With the Preview tab displayed (if not see Step 5 above) locate PO 06013851 in the list. Notice the  Plus Symbol to the left of PO. This signifies that there are multiple lines to the PO. Click  and it will change to a  Minus Symbol .

After:



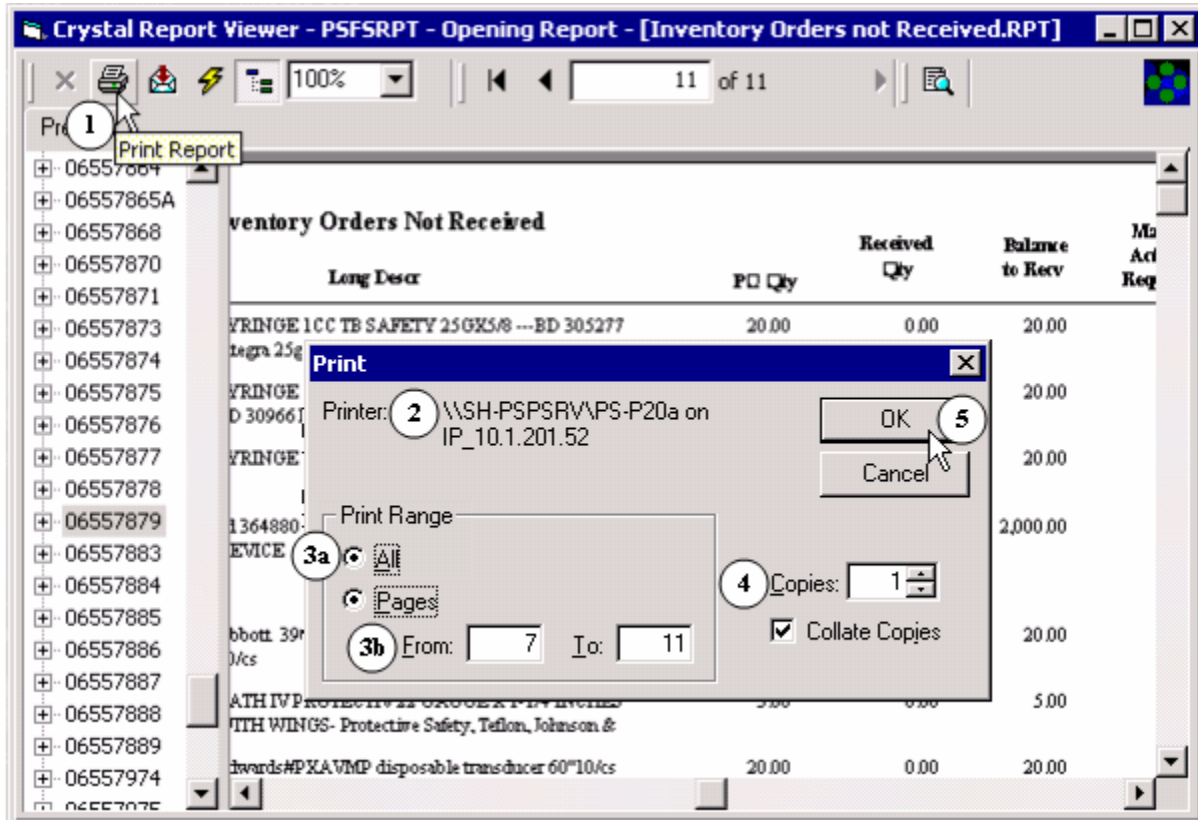
Step	Action
21.	Click on PO 06013851 to highlight and the resulting page of the report will display with the specified PO outlined in blue .
22.	Click  Toggle Group Tree button to hide the Preview tab and to present a full window display of the report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.



Continue with **Printing the Inventory Orders Not Received Report** section.

Printing the Inventory Orders Not Received Report

The **Crystal Report Viewer** with the **Inventory Orders Not Received** Report displays.

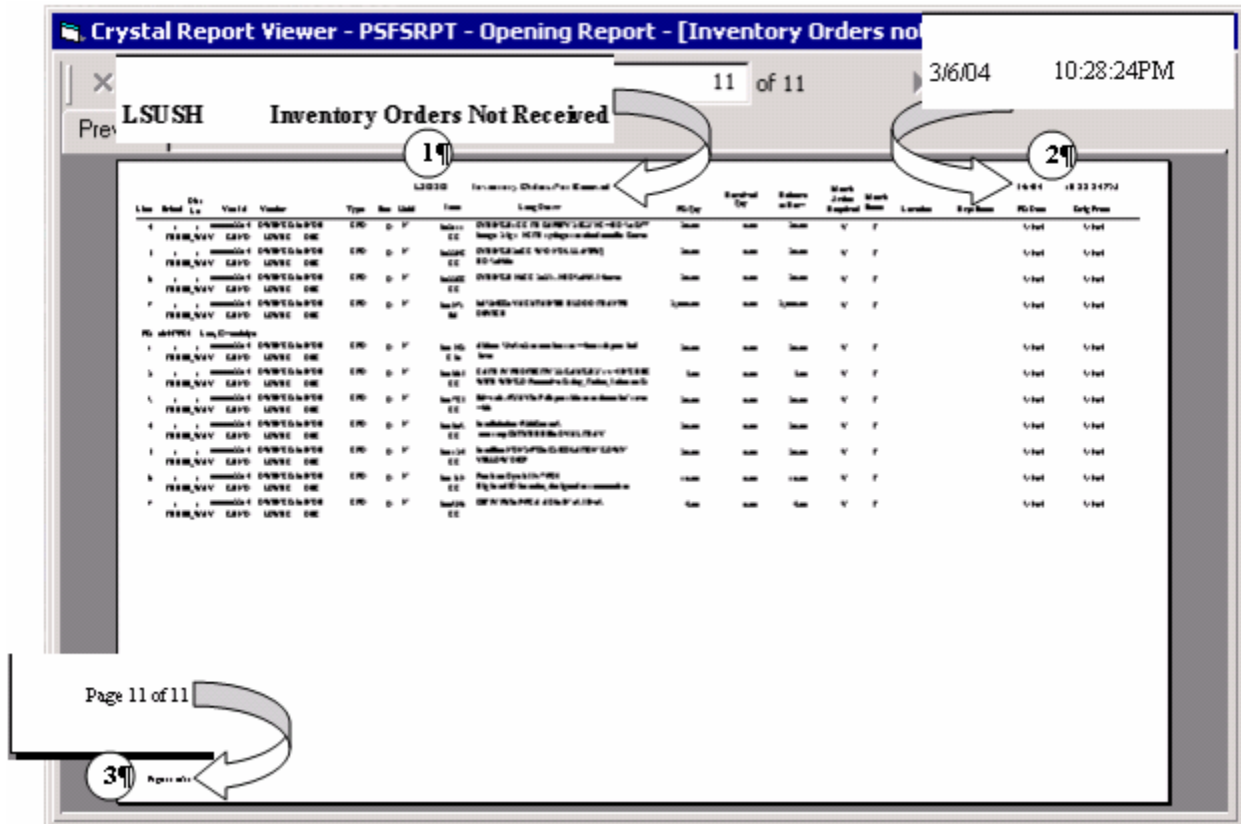
After viewing the report it may be necessary to print any section of the report; from a single page to a range of pages to the entire report. The viewing configuration of the report does not impact the printed report.



Step	Action
1.	Click  Print Report button to initiate the print options for a Report.
2.	The report will print to the designated Network Printer .
3.	Select Print Range desired: <ol style="list-style-type: none"> All to print the entire report Pages - From/To to print a specific range of pages
4.	Enter a number for Copies greater than 1 if desired.
5.	Click  to execute the Print options.

Continue with **Analyze the Inventory Orders Not Received Report** section.

Analyze the Inventory Orders Not Received Report



Each of the Inventory Reports will have three consistent items that will print on each and every page of the report.

Step	Action
1.	The Title of the Report will be on the top center of each page of the report
2.	The Date and Time the Report was run will print on the top right edge of each page of the report
3.	The Page and Total Pages of the Report will print on the bottom left of each page of the report.

Sample **Inventory Orders Not Received** Report as displayed in the **Crystal Report Viewer**

										LSUSH	Inventory Orders Not Received		
5 Line	Sched	Dist Ln	Ven Id	Vendor	Type	Stat	Hold	Item	Long Descr				
4	PO	06014450	Lee, Gwendolyn										
5	1	1	0000002214	OWENS & MINOR	SPO	D	N	601319	Kimberly Clark #62124 Heavy duty kingguard one-step size 24x24; 120/cs.				
6	THREE_WAY	GRND	LSWHS	DES									
2	1	1	0000002214	OWENS & MINOR	SPO	D	N	601321	Kimberly Clark #62136 Heavy Duty Kingguard one step size 36x36;				
	THREE_WAY	GRND	LSWHS	DES									
3	1	1	0000002214	OWENS & MINOR	SPO	D	N	601323	Kimberly Clark #62154 Heavy Duty Kingguard one step wrap 54x54;				
	THREE_WAY	GRND	LSWHS	DES									

5	PO Qty	Received Qty	Balance to Recv	Match Action Required	Match Status	Location	Rcpt Status	PO Date	Orig Prom
								3/6/04	10:28:24PM
5	50.00	35.00	15.00	Y	P	SP010100	M	8/28/03	8/25/03
	350.00	215.00	135.00	Y	P	SP010100	M	8/28/03	8/25/03
	1,500.00	970.00	530.00	Y	P	SP010100	M	8/28/03	

The Inventory Orders Not Received Report contains information in the body of the report that have Headings, as well as information that does not have Headings displayed at the top of each page. The information is in three steps for ease of understanding.

Step	Action
4.	Each report is first grouped by PO and listed in ascending order. The following do not have Headings displayed on the report: <ul style="list-style-type: none"> ▪ PO – Each PO number with a balance to receive is listed in bold print. ▪ Buyer – Each PO has Purchasing Buyer’s name in bold print.

Step	Action
5.	<p>The following do have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ Line – Individual PO Lines for the PO number with a remaining amount. ▪ Sched – PO schedule number ▪ Dist Ln – Distribution Line ▪ Ven ID – Vendor number ▪ Vendor – Vendor Short Name ▪ Type – PO Type ▪ Stat – PO Status – A = Approved, D = Dispatched, O = Open ▪ Hold – PO Hold Status – Y (Yes) = On Hold; or N (No) = Not on Hold ▪ Item – Inventory Item ID purchased on PO ▪ Long Descr – Inventory Item ID description ▪ PO Qty – Qty on PO Line Distribution Ordered ▪ Received Qty – Qty Received on PO Line Distribution ▪ Balance to Recv – Balance to Receive on PO Line Distribution ▪ Match Action Required – PO Match Action Required (Y = Yes; N = No). Match action should always be Y for Inventory PO's. ▪ Match Status – PO Match Status (T = To be matched; N = Not required and should not exist on inventory PO's; P = Partially Matched) ▪ Location – Location Inventory Item shipped to ▪ Rcpt Status – Receipt Status – M = Moved to Inventory which applies to Qty already received on the PO Line Distribution which indicates the received qty is included in the balance on hand in inventory; R = Received which applies to Qty already received on the PO Line Distribution which indicates the received qty is NOT included in the balance on hand in inventory; "blank" = not received. ▪ PO Date – Date PO was created ▪ Orig Prom – Original Promise date entered on the PO. Original Promise date should be entered on the PO to track vendor's promise to deliver date.
6.	<p>The following do not have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ Match Control – THREE-WAY = PO/Receipt/Voucher required for payment. All Inventory PO's should be THREE-WAY Match Control ▪ Ship Via – Transportation mode selected for shipment of the order ▪ INV BU – Inventory BU ▪ Freight Terms – DES = Destination; PPA = Prepaid and Add

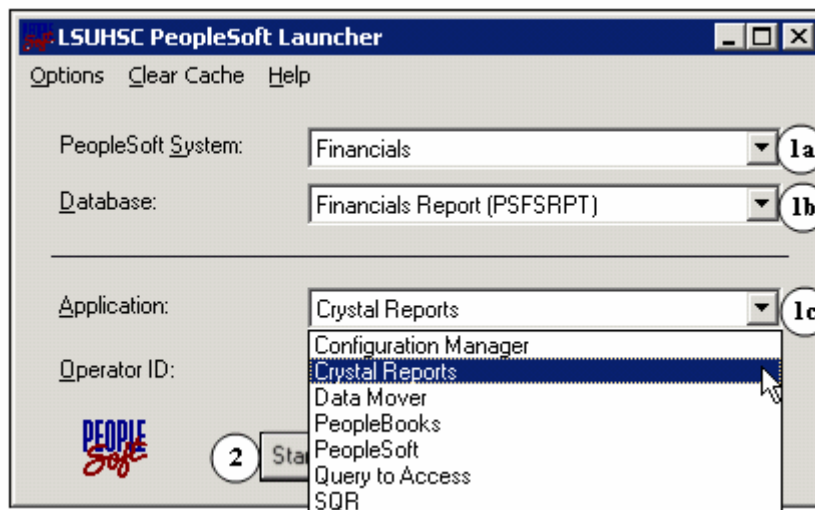
End of the **Inventory Orders Not Received Report** section. Click [here](#) to **Return to Start of this IR.**


Report #2: Inventory Open PO Report.

- [Access & Run the Inventory Open PO Report](#)
- [Viewing the Inventory Open PO Report](#)
- [Printing the Inventory Open PO Report](#)
- [Analyze the Inventory Open PO Report](#)

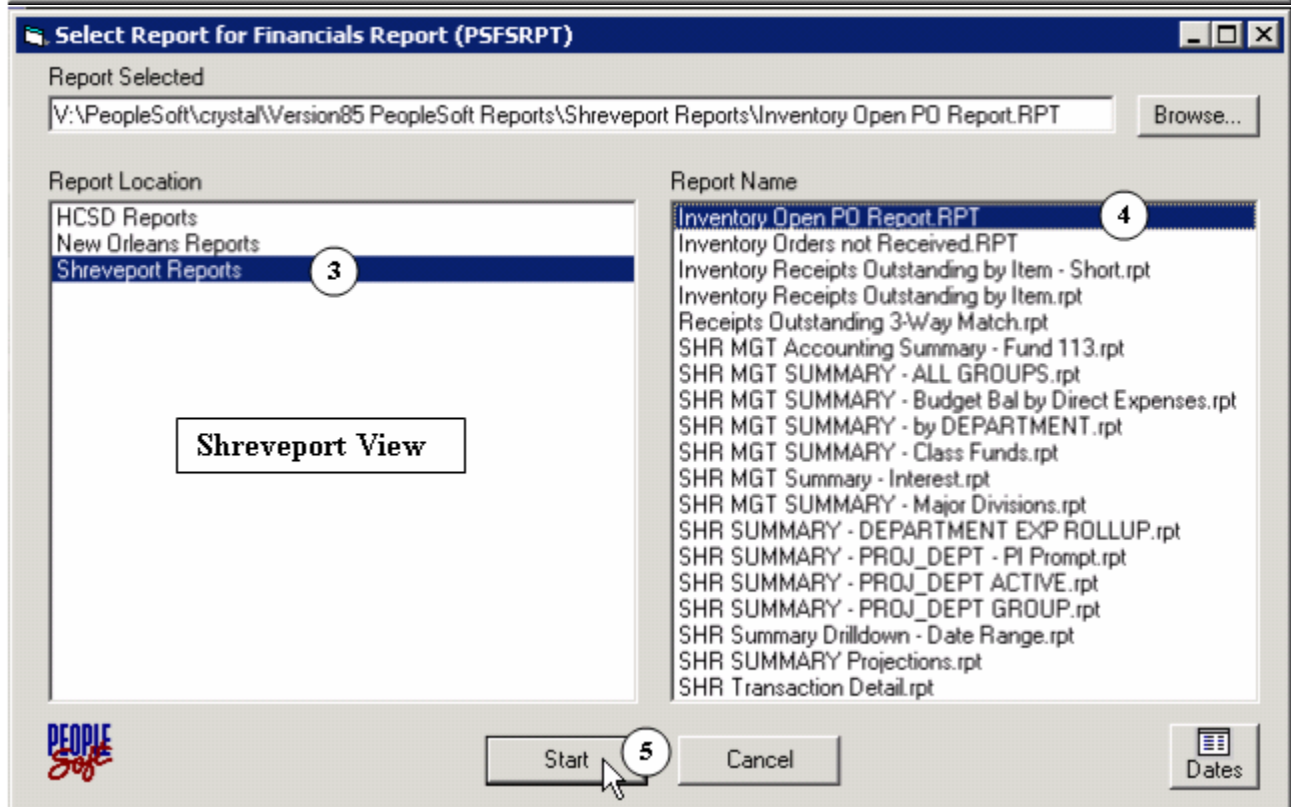
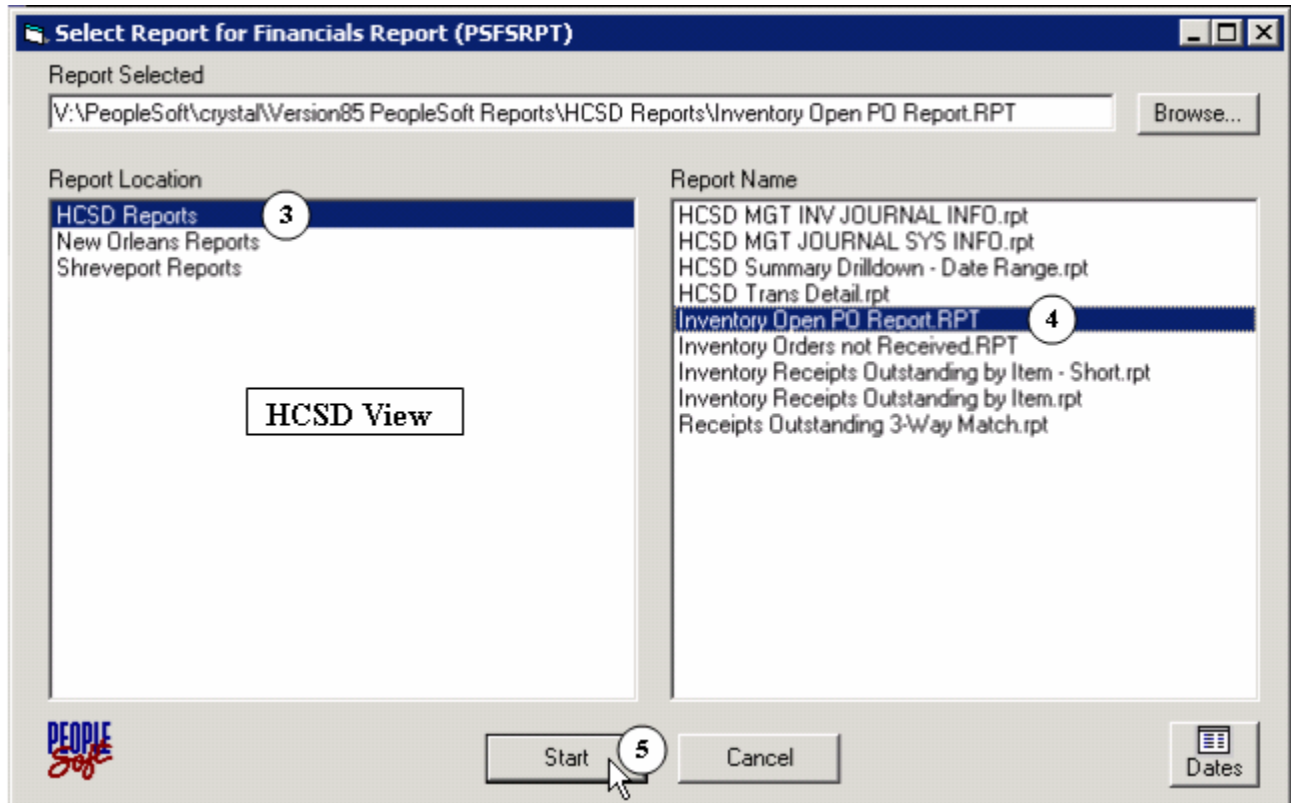
Navigation & Process


Accessing & Running the Inventory Open PO Report



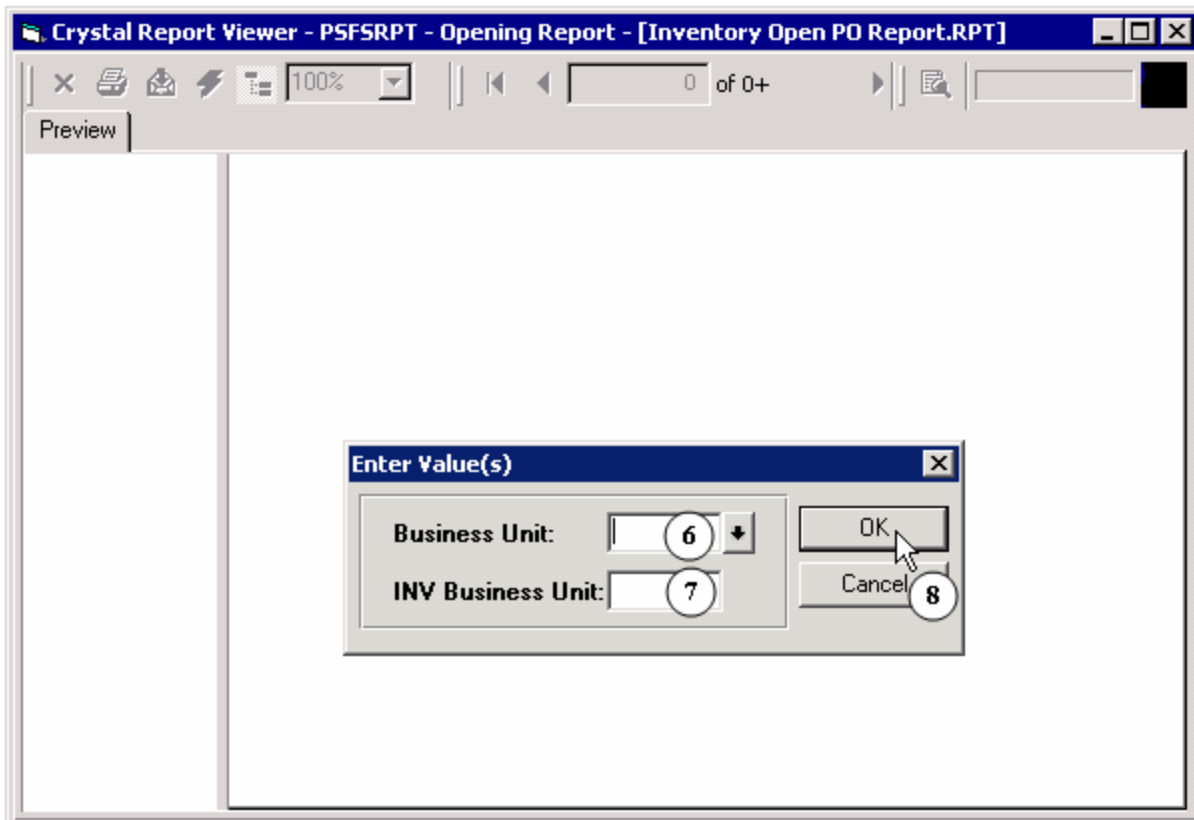
Step	Action
1.	From the LSUHSC PeopleSoft Launcher Select: <ul style="list-style-type: none"> a. PeopleSoft System: <i>Financials</i> b. Database: <i>Financials Report (PSFSRPT)</i> c. Application: <i>Crystal Reports</i>
2.	With all the proper selections made, Click the  button.

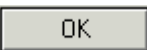
The **Select Report for Financial Report (PSFSRPT)** dialog box displays.



Step	Action
3.	From the Report Location : Select <i>HCSD Reports</i> or <i>Shreveport Reports</i>
4.	From the Report Name : Select <i>Inventory Open PO Report</i>
5.	With all the proper selections made, Click the  button.

The **Crystal Report Viewer** window displays.



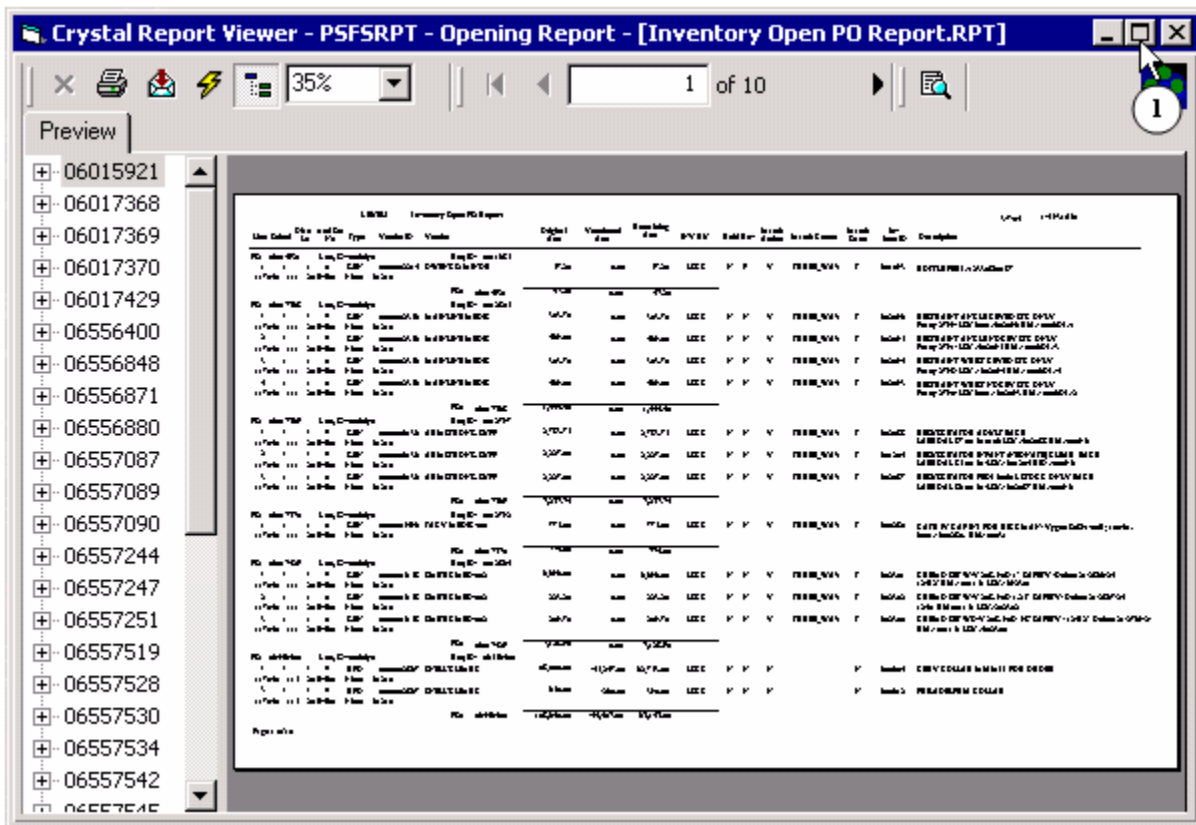
Step	Action
6.	Enter or Select Business Unit : <i>Appropriate Purchasing BU</i>
7.	Enter the INV Business Unit : <i>Appropriate Inventory BU</i>
8.	With all the proper selections made, Click the  button.


Continue with **Viewing the Inventory Open PO Report** section.

Viewing the Inventory Open PO Report

The Crystal Report Viewer with the Inventory Open PO Report displays.

Since the report is at a less than optimal size for viewing, several features of the Crystal Report Viewer window will be discussed. All of following features may serve the End-User in viewing, printing, refreshing, or simply moving around several pages with ease. The focus of this section will be on buttons found at the top of the Crystal Report Viewer. In addition, the functional use of the Preview tab will be discussed.














Step	Action
1.	<p>It is essential to make use of the maximum use of the viewing screen available, therefore:</p> <p>Click:  the Maximize button on the Title bar</p>

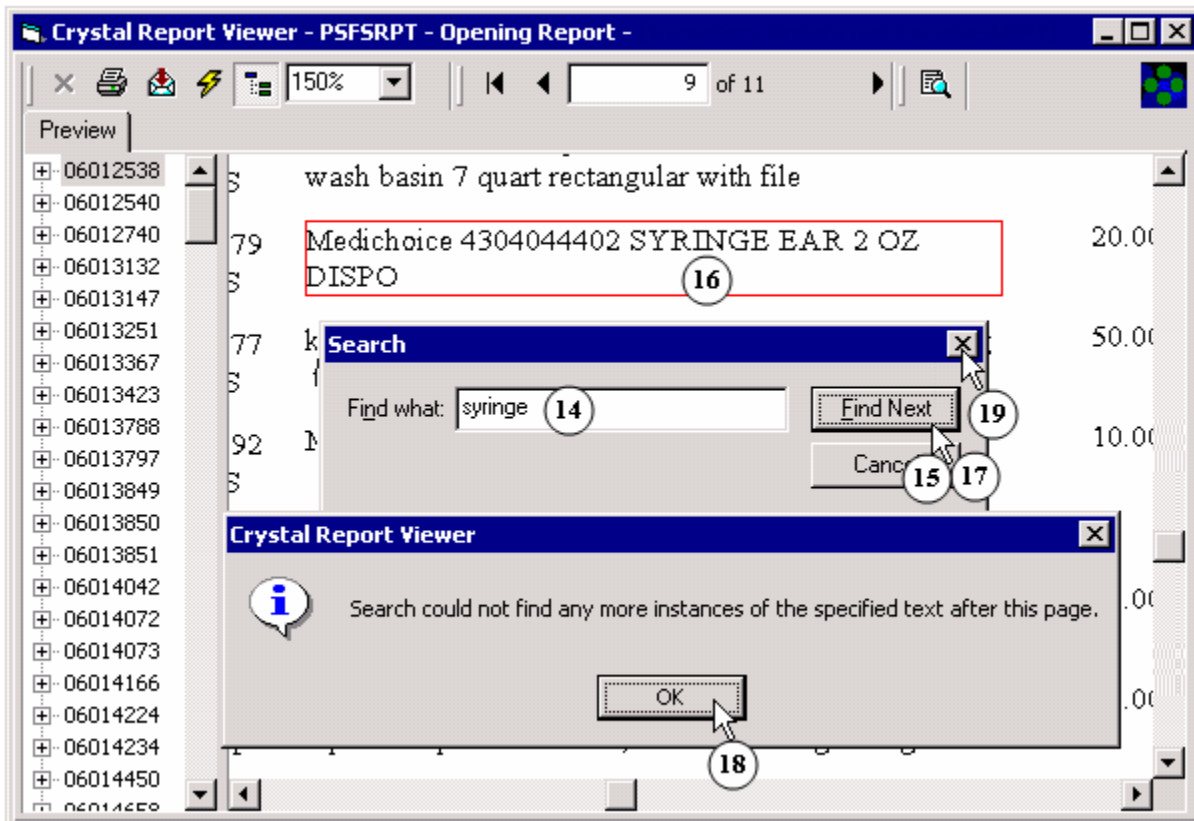
Discussion will continue with the series of **Icons** (buttons) located at the top of the Crystal Report Viewer window.


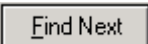

The Crystal Report Viewer Icons





Step	Action
2.	Click  Print Report button to initiate the print options for a Report. This button will be discussed in detail in the next section.
3.	Click  Export Report button to save a copy of a report to an Acrobat Format (PDF) file and save a single or multiple pages of the report
4.	Click  Refresh button to run the similar report currently viewing but for either a different Business Unit and/or INV Business Unit without closing the Crystal Report Viewer window.
5.	Click  Toggle Group Tree button to hide the Preview tab. Turning this button off (on by default) will present a full window display of any report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.
6.	Initially the report is displayed in a percentage viewing less than 100% Click in  Zoom box to enter any (larger) percentage value so to "zoom in" to get a close-up view of your document or (less)"zoom out" to see more of the page at a reduced size. Or Click the arrow next to the Zoom box and Click the zoom setting you want to either enlarge or reduce to a value other than the current percentage viewing.
7.	Click  Go To First Page button when on any page past the first page of a multi-page report to return to the first page of the report.
8.	Click  Go To Previous Page button to view the previous page from the current page displayed.
9.	Click in  Page Number box to enter and view a specific page of a multi-page report. Type a value in the box and Press Enter key and said page of report will display.
10.	Click  Go To Next Page button to view the next page from the current page displayed.
11.	Click  Go To Last Page button when on any page of a multi-page report to return to the last page of the report.

Step	Action
12.	Click  Stop Load button if necessary to stop a report from loading after entering Business Unit and INV Business Unit values. Not available after report displays.



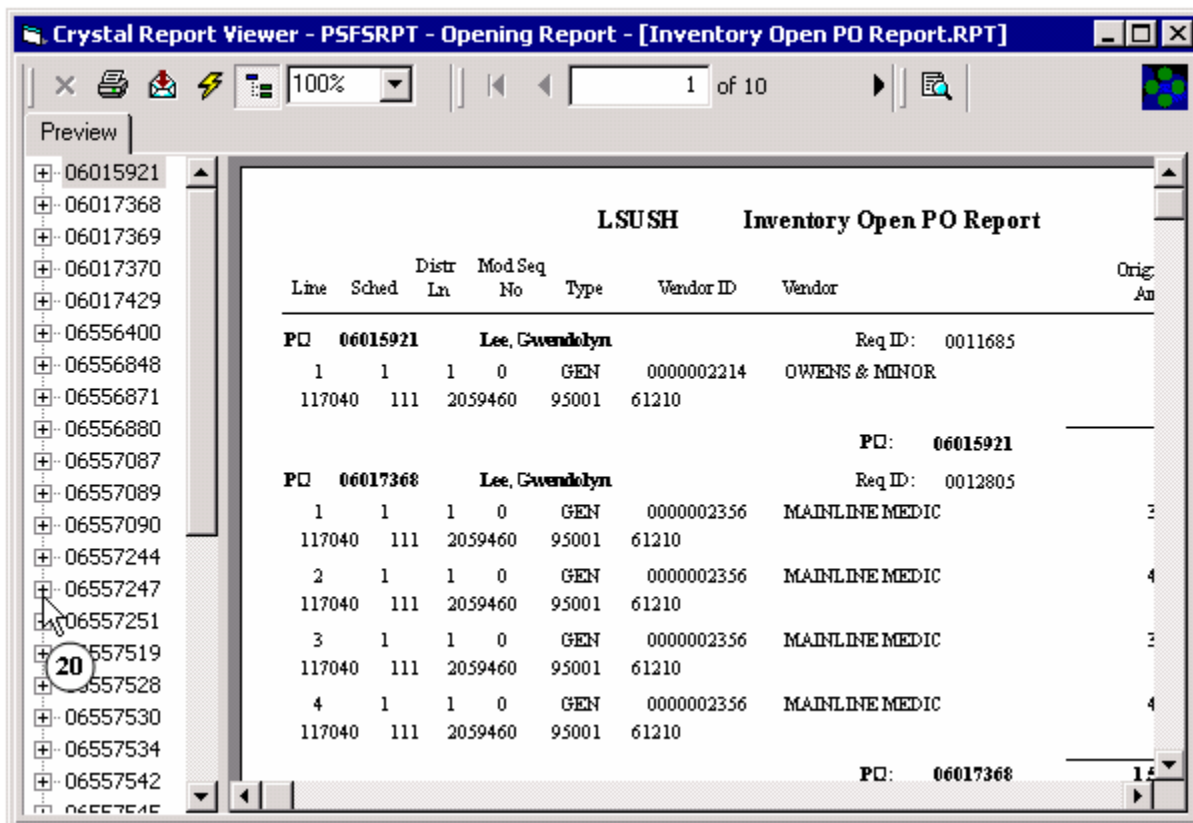
Step	Action
13.	Click  Search Text button to display a Search dialog box and find any item (alpha or numeric) within the report.
14.	Enter Find what entry in the Search box. Value(s) entered are not case-sensitive.
15.	Click  to begin the search process.
16.	The text will be located on any page of the report and will appear within a Red Box .
17.	Click  repeatedly to continue displaying similar entries found in the report.




Step	Action
18.	When no further entries can be located in the report, an Information box displays. Click  to close Information box
19.	Click  Close button located on top right of Search dialog box to return to report viewing.

The next discussion will focus on utilizing the **Preview** tab of the **Crystal Report Viewer**.

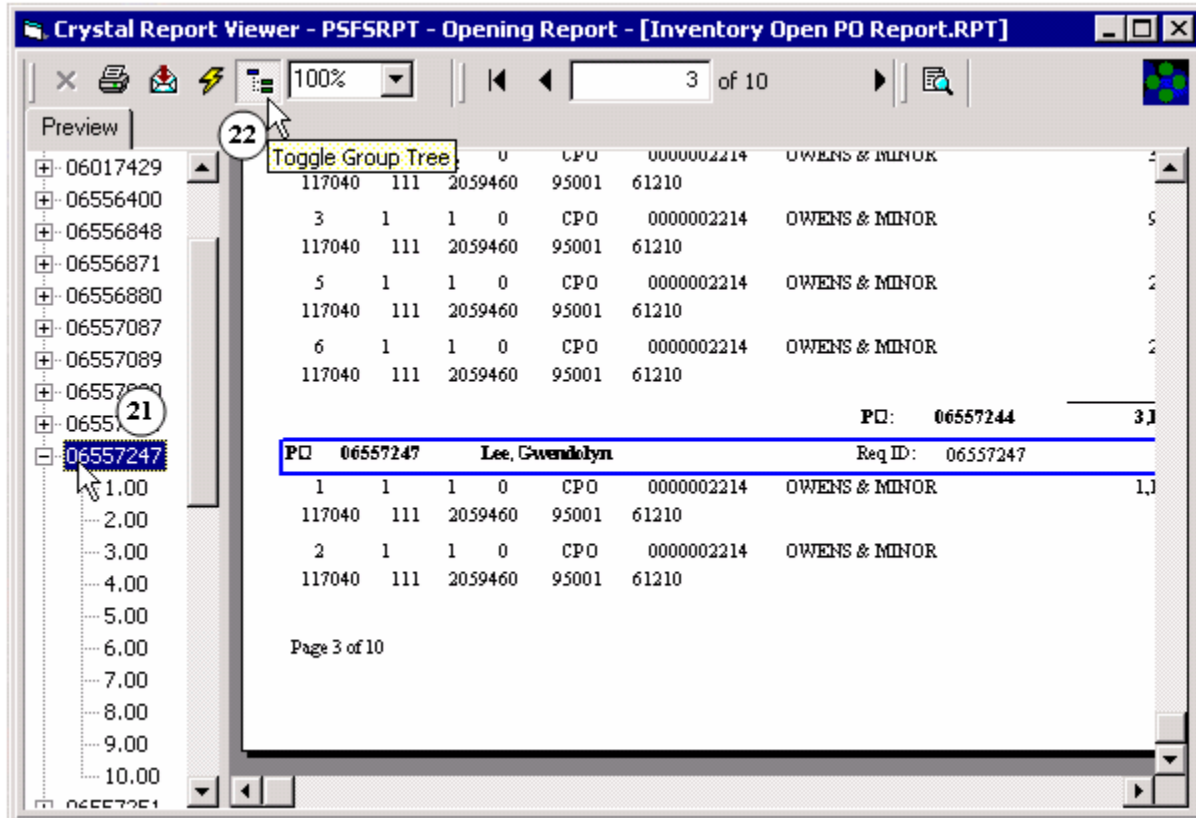
If the need arises to focus on one specific Purchase Order (PO) of the report and on a specific associated PO Line, then the **Preview** tab will prove to be a time saver as opposed to viewing each page of the report until the PO is located. As an example, the following will illustrate the steps in locating and viewing the specific **PO 06557247 Line 2**.


Before:



Step	Action
20.	With the Preview tab displayed (if not, see Step 5 above) locate PO 06557247 in the list. Notice the  Plus Symbol to the left of PO. This signifies that there are multiple lines to the PO. Click  and it will change to a  Minus Symbol .

After:



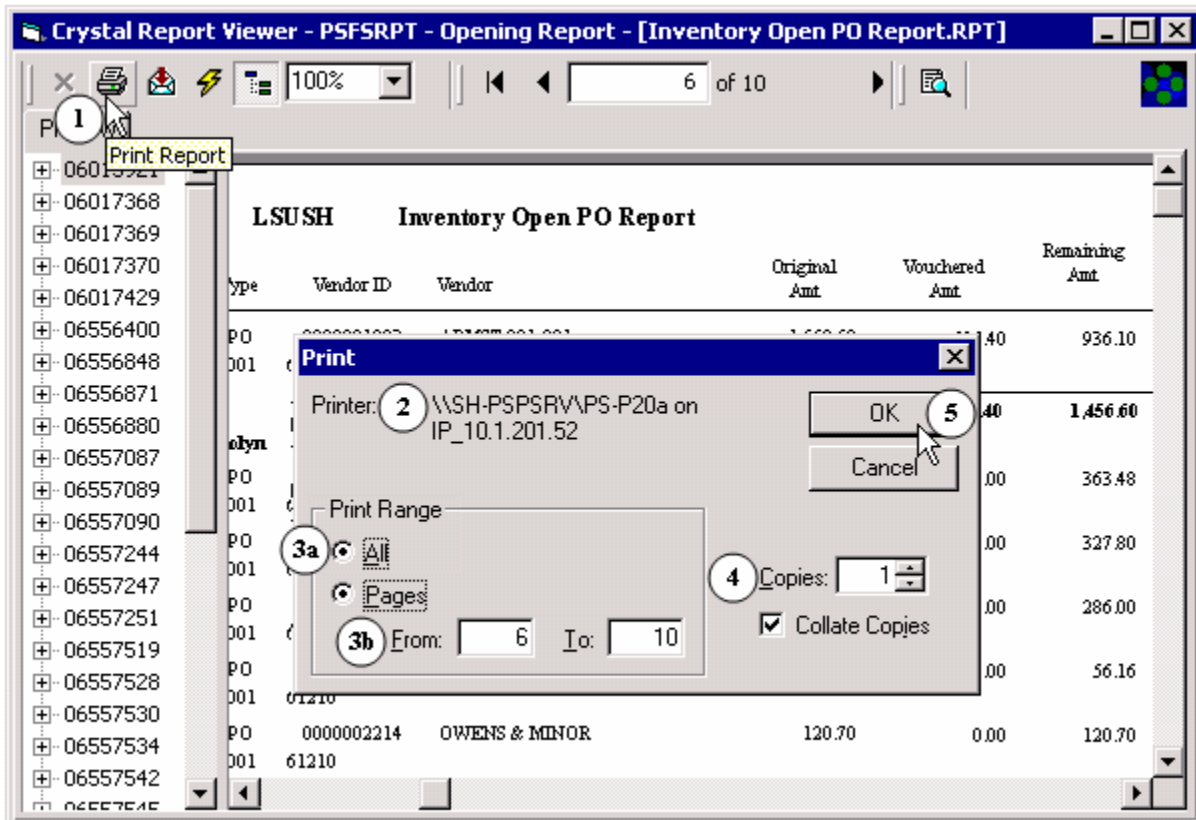
Step	Action
21.	Click on PO 06557247 to highlight and the resulting page of the report will display with the specified PO outlined in blue .
22.	Click  Toggle Group Tree button to hide the Preview tab and to present a full window display of the report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.



Continue with **Printing the Inventory Open PO Report** section.

Printing the Inventory Open PO Report

The **Crystal Report Viewer** with the **Inventory Open PO Report** displays.

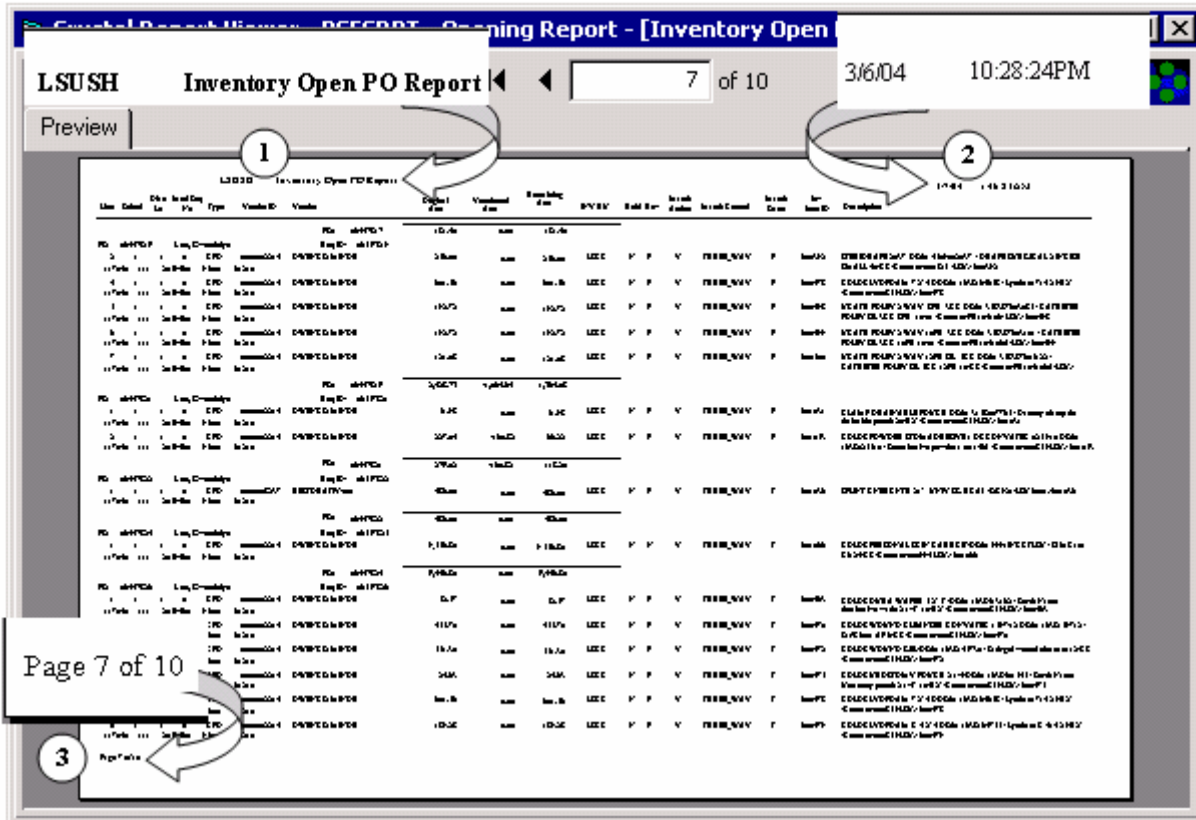
After viewing the report it may be necessary to print any section of the report; from a single page to a range of pages to the entire report. The viewing configuration of the report does not impact the printed report.



Step	Action
1.	Click  Print Report button to initiate the print options for a Report.
2.	The report will print to the designated Network Printer .
3.	Select Print Range desired: a. All to print the entire report b. Pages - From/To to print a specific range of pages
4.	Enter a number for Copies greater than 1 if desired.
5.	Click  to execute the Print options.

Continue with **Analyze the Inventory Open PO Report** section.

Analyze the Inventory Open PO Report



Each of the Inventory Reports will have three consistent items that will print on each and every page of the report.

Step	Action
1.	The Title of the Report will be on the left center of each page of the report
2.	The Date and Time the Report was run will print on the top right edge of each page of the report
3.	The Page and Total Pages of the Report will print on the bottom left of each page of the report.

Sample **Inventory Open PO Report** as displayed in the **Crystal Report Viewer**

LSUSH Inventory Open PO Report									
Line	Sched	Distr Ln	Mod Seq No	Type	Vendor ID	Vendor	Original Amt	Vouchered Amt	Remaining Amt
PO: 06557817							181.50	0.00	181.50
4 PO		06557819		Lee, Gwendolyn			Req ID: 06557819		
5	2	1	1	0	CPO	0000002214 OWENS & MINOR	256.00	0.00	256.00
6	117040	111	2059460	95001	61210				
	4	1	1	0	CPO	0000002214 OWENS & MINOR	601.56	0.00	601.56
	117040	111	2059460	95001	61210				
	5	1	1	0	CPO	0000002214 OWENS & MINOR	192.72	0.00	192.72
	117040	111	2059460	95001	61210				
	6	1	1	0	CPO	0000002214 OWENS & MINOR	192.72	0.00	192.72
	117040	111	2059460	95001	61210				
	7	1	1	0	CPO	0000002214 OWENS & MINOR	121.08	0.00	121.08
	117040	111	2059460	95001	61210				
4 PO: 06557819							2,428.73	-1,064.65	1,364.08
							3/7/04	1:46:23AM	
INVB	U	Hold	Rcv	Match Action	Match Control	Match Status	Inv Item ID	Description	
5	LSCS	N	P	Y	THREE_WAY	P	600392	STERIDRAPE 2037 O&M 4509002037 - DRAPE SURGICAL 2 INCISE SMALL 40/CS - Contract:000525 -LSU#600392	
	LSCS	N	P	Y	THREE_WAY	P	600478	COLOS LYOFAM 7 X 4 O&M 1638164658 - Lyofam 7x4 25/BX - Contract:000855-LSU#600478	
	LSCS	N	P	Y	THREE_WAY	P	600498	UCATH FOLEY 2 WAY 8FR 3CC O&M 358387603085 - CATHETER FOLEY SIL 3CC 8FR 10/cs - Contract:PR104106-LSU#600498	
	LSCS	N	P	Y	THREE_WAY	P	600499	UCATH FOLEY 2 WAY 10FR 3CC O&M 358387603101 - CATHETER FOLEY SIL 3CC 10FR 10/cs - Contract:PR104106A-LSU#600499	
	LSCS	N	P	Y	THREE_WAY	P	600500	UCATH FOLEY 2 WAY 12FR SIL 5CC O&M 358387605122 - CATHETER FOLEY SIL 5CC 12FR 10/CS - Contract:PR104106A-LSU#	

The Inventory Open PO Report contains information in the body of the report that have Headings, as well as information that does not have Headings displayed at the top of each page. The information is in three steps for ease of understanding.

Step	Action
4.	Each report is first grouped by PO and listed in ascending order. The following do not have Headings displayed on the report: <ul style="list-style-type: none"> ▪ PO – Each PO number with a remaining amount is listed in bold print. ▪ Buyer – Each PO has Purchasing Buyer’s name in bold print. ▪ Req ID – Each Requisition associated with the PO (If PO was not sourced from a requisition, the heading will print but the requisition id will be blank. ▪ PO Total Line – Totals for Original, Vouchered, and Remaining Amounts.

Step	Action
5.	<p>The following do have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ Line – Individual PO Lines for the PO number with a remaining amount. ▪ Sched – PO schedule number ▪ Distr Ln – Distribution Line ▪ Mod Seq No – Modification Sequence No. ▪ Type – PO Type ▪ Vendor ID – Vendor number ▪ Vendor – Vendor Short Name ▪ Original Amt – PO Distribution Line Amount ▪ Vouchered Amt – Total vouchered for the PO Distribution Line ▪ Remaining Amt – difference in Original Amt and Vouchered Amt ▪ INV BU – Inventory Business Unit for which the item was purchased ▪ Hold – PO Hold Status (Y = Yes or N = No) ▪ Rcv – PO Receipt Status (N = Not Received; P = Partially Received) ▪ Match Action – PO Match Action Required (Y = Yes; N = No) ▪ Match Control – PO Match Control Rule (Should always be Three-Way) ▪ Match Status – PO Match Status (T = To be matched; N = Not required and should not exist on inventory PO's; P = Partially Matched) ▪ Inv Item ID – Inventory item ID purchased on PO ▪ Description – Inventory item ID description
6.	<p>The following do not have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ PS Account – People Soft Account Number ▪ Fund – Fund Code ▪ Department – Department ID ▪ Program – Program Code ▪ Class – Class Code

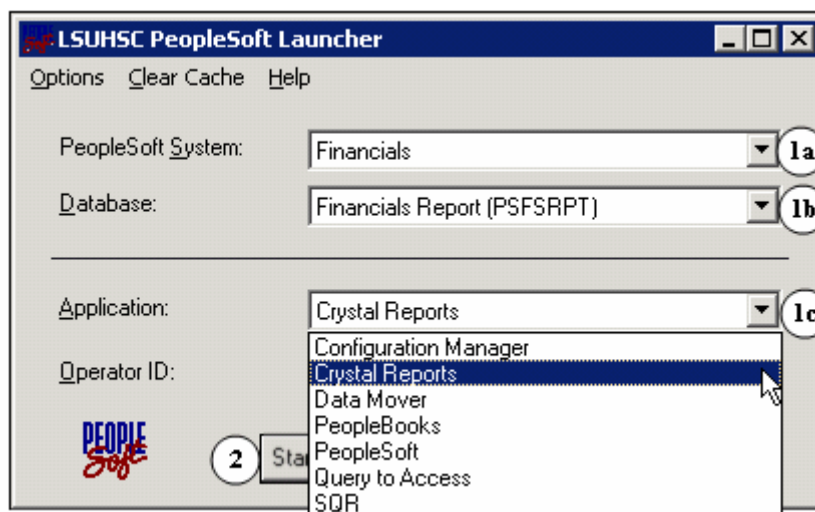
End of the **Inventory Open PO Report** section. Click [here](#) to **Return to Start of this IR.**

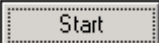
Report #3: Inventory Receipts Outstanding By Item.

- [Access & Run the Inventory Receipts Outstanding By Item Report](#)
- [Viewing the Inventory Receipts Outstanding By Item Report](#)
- [Printing the Inventory Receipts Outstanding By Item Report](#)
- [Analyze the Inventory Receipts Outstanding By Item Report](#)

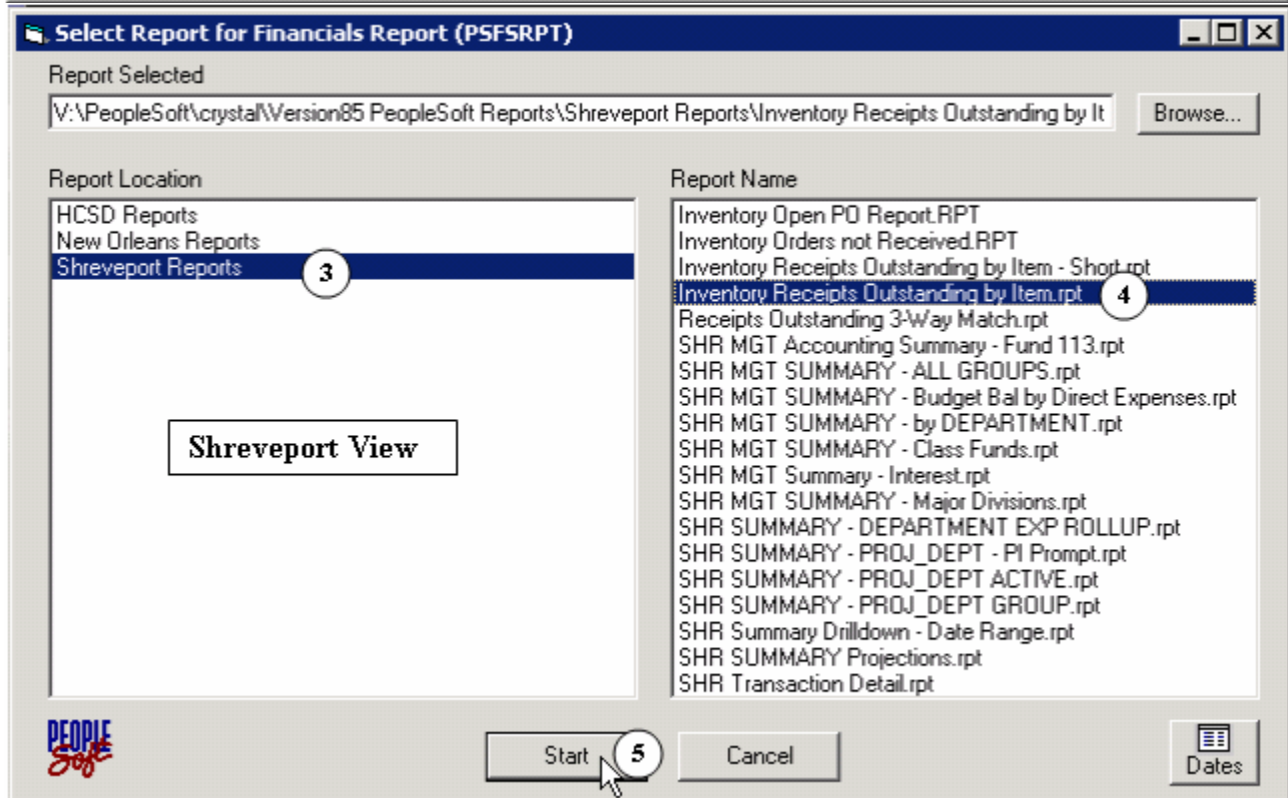
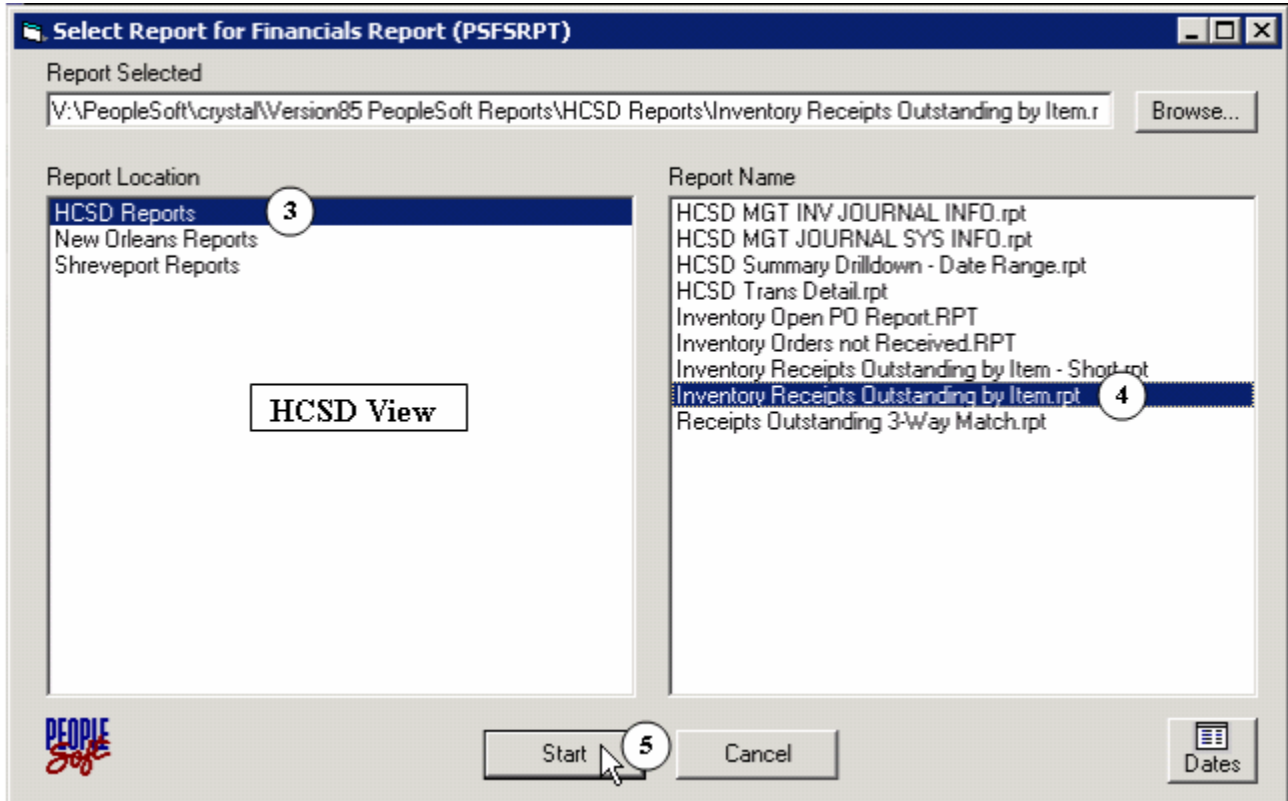
Navigation & Process


Accessing & Running the Inventory Receipts Outstanding By Item Report



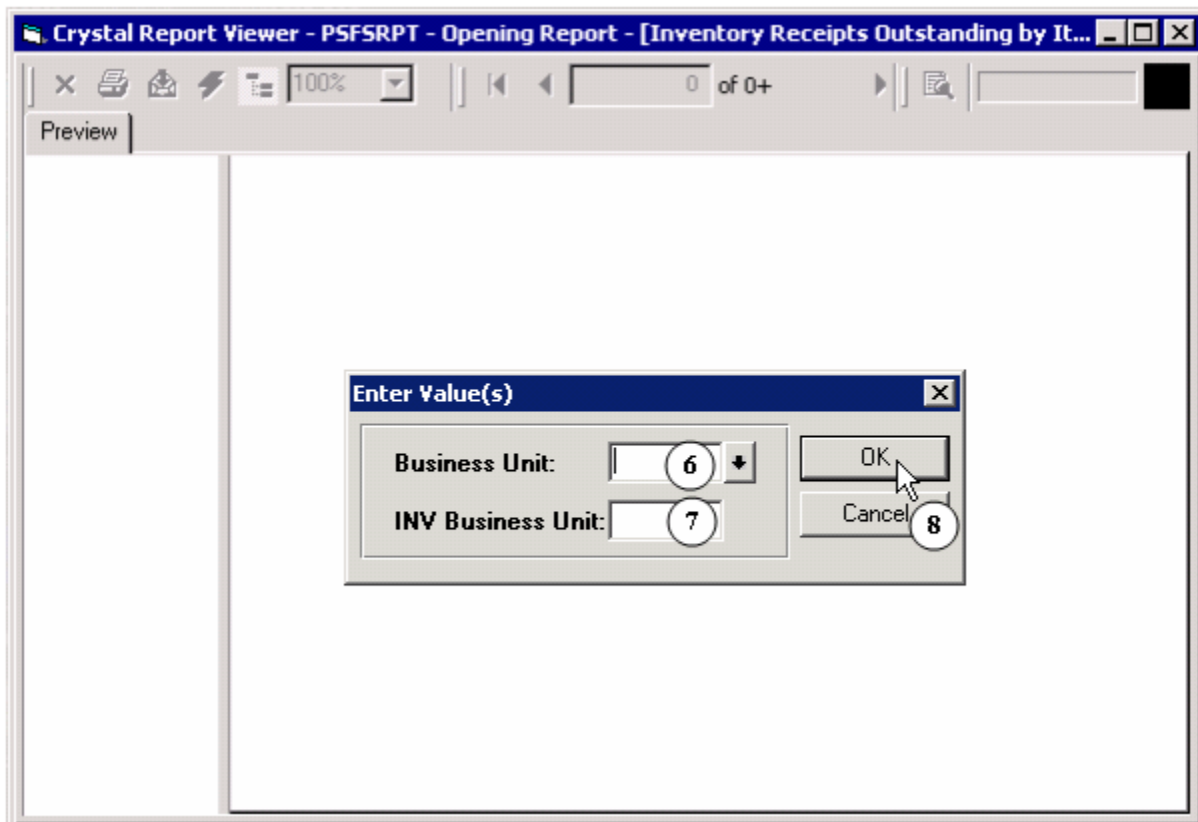
Step	Action
1.	From the LSUHSC PeopleSoft Launcher Select: <ul style="list-style-type: none"> a. PeopleSoft System: <i>Financials</i> b. Database: <i>Financials Report (PSFSRPT)</i> c. Application: <i>Crystal Reports</i>
2.	With all the proper selections made, Click the  button.


The **Select Report for Financial Report (PSFSRPT)** dialog box displays.



Step	Action
3.	From the Report Location : Select <i>HCSD Reports</i> or <i>Shreveport Reports</i>
4.	From the Report Name : Select <i>Inventory Receipts Outstanding By Item</i>
5.	With all the proper selections made, Click the  button.

The **Crystal Report Viewer** window displays.



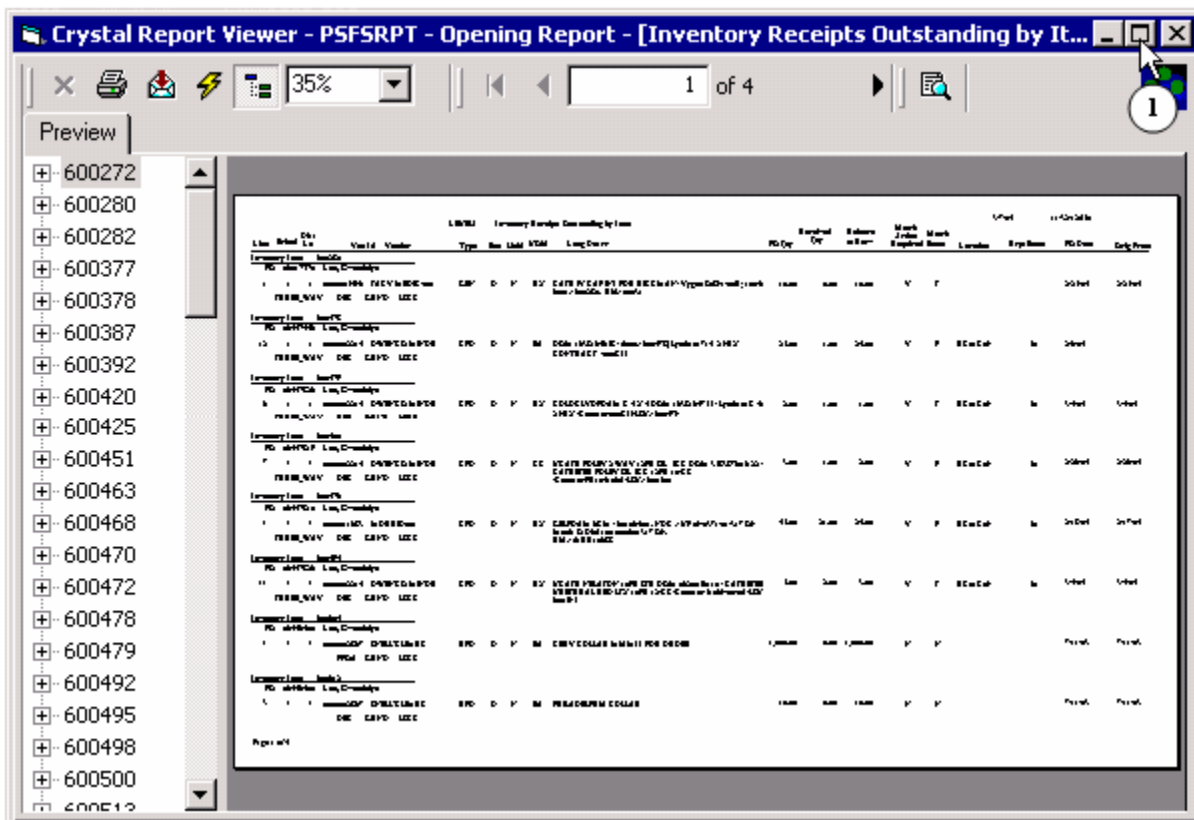
Step	Action
6.	Enter or Select Business Unit : <i>Appropriate Purchasing BU</i>
7.	Enter the INV Business Unit : <i>Appropriate Inventory BU</i>
8.	With all the proper selections made, Click the  button.


Continue with **Viewing the Inventory Receipts Outstanding By Item Report** section.

Viewing the Inventory Receipts Outstanding By Item Report

The **Crystal Report Viewer** with the **Inventory Receipts Outstanding by Item Report** displays.

Since the report is at a less than optimal size for viewing, several features of the Crystal Report Viewer window will be discussed. All of following features may serve the End-User in viewing, printing, refreshing, or simply moving around several pages with ease. The focus of this section will be on buttons found at the top of the Crystal Report Viewer. In addition, the functional use of the Preview tab will be discussed.














Step	Action
1.	<p>It is essential to make use of the maximum use of the viewing screen available, therefore:</p> <p>Click:  the Maximize button on the Title bar</p>

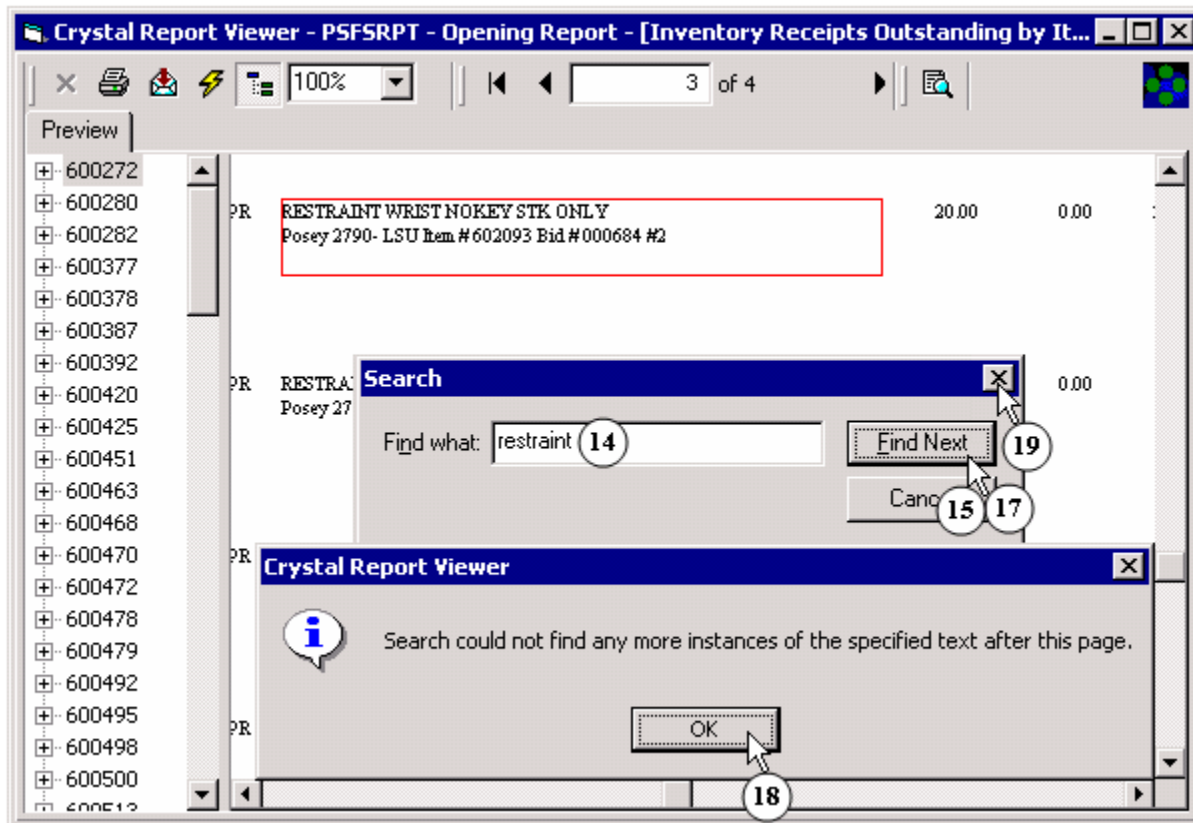
Discussion will continue with the series of **Icons** (buttons) located at the top of the Crystal Report Viewer window.




The Crystal Report Viewer Icons





Step	Action
2.	Click  Print Report button to initiate the print options for a Report. This button will be discussed in detail in the next section.
3.	Click  Export Report button to save a copy of a report to an Acrobat Format (PDF) file and save a single or multiple pages of the report
4.	Click  Refresh button to run the similar report currently viewing but for either a different Business Unit and/or INV Business Unit without closing the Crystal Report Viewer window.
5.	Click  Toggle Group Tree button to hide the Preview tab. Turning this button off (on by default) will present a full window display of any report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.
6.	Initially the report is displayed in a percentage viewing less than 100% Click in  Zoom box to enter any (larger) percentage value so to "zoom in" to get a close-up view of your document or (less)"zoom out" to see more of the page at a reduced size. Or Click the arrow next to the Zoom box and Click the zoom setting you want to either enlarge or reduce to a value other than the current percentage viewing.
7.	Click  Go To First Page button when on any page past the first page of a multi-page report to return to the first page of the report.
8.	Click  Go To Previous Page button to view the previous page from the current page displayed.
9.	Click in  Page Number box to enter and view a specific page of a multi-page report. Type a value in the box and Press Enter key and said page of report will display.
10.	Click  Go To Next Page button to view the next page from the current page displayed.
11.	Click  Go To Last Page button when on any page of a multi-page report to return to the last page of the report.

Step	Action
12.	Click  Stop Load button if necessary to stop a report from loading after entering Business Unit and INV Business Unit values. Not available after report displays.



Step	Action
13.	Click  Search Text button to display a Search dialog box and find any item (alpha or numeric) within the report.
14.	Enter Find what entry in the Search box. Value(s) entered are not case-sensitive.
15.	Click  Find Next to begin the search process.
16.	The text will be located on any page of the report and will appear within a Red Box .
17.	Click  Find Next repeatedly to continue displaying similar entries found in the report.

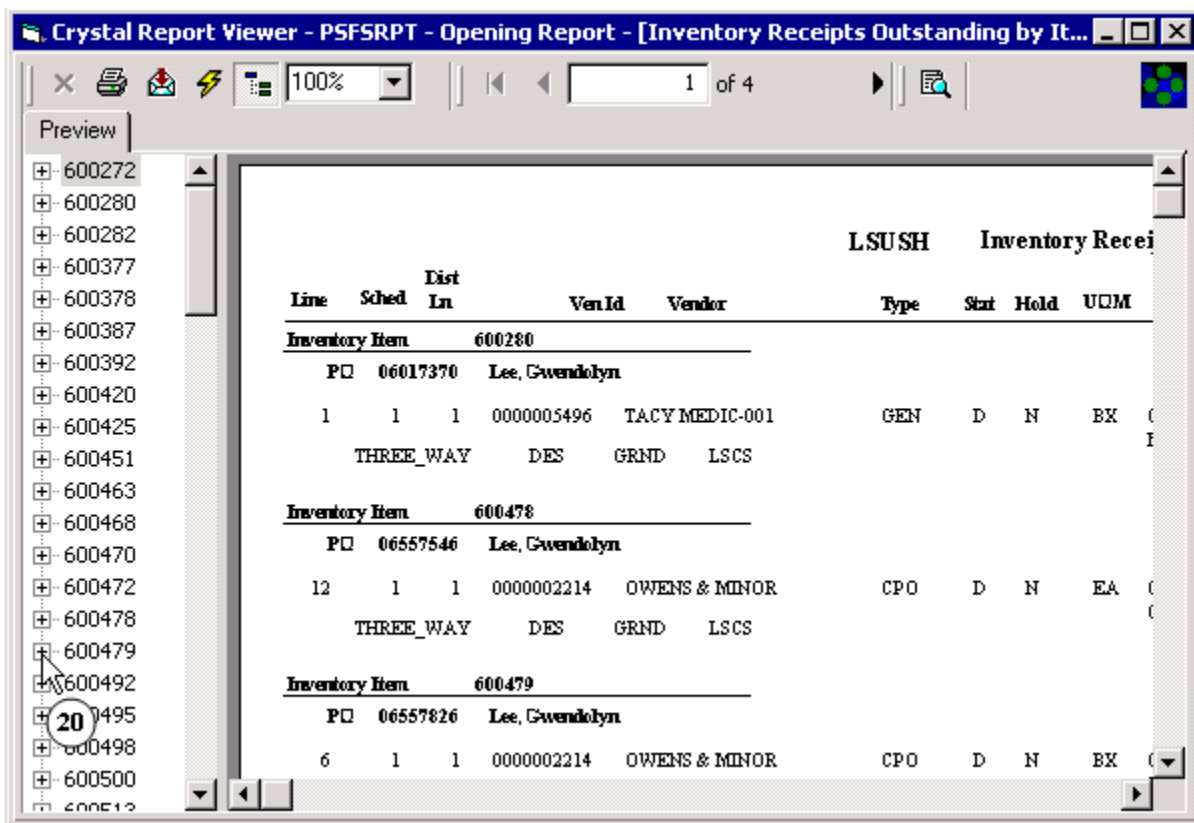
Step	Action
18.	When no further entries can be located in the report, an Information box displays. Click  to close Information box
19.	Click  Close button located on top right of Search dialog box to return to report viewing.




The next discussion will focus on utilizing the **Preview** tab of the **Crystal Report Viewer**.

If the need arises to focus on a specific **Item ID** (Inventory Item) in the report and its associated PO and PO Line, then the **Preview** tab will prove to be a time saver as oppose to viewing each page of the report. As an example, the following will illustrate the steps in locating and viewing the specific **Item ID**.

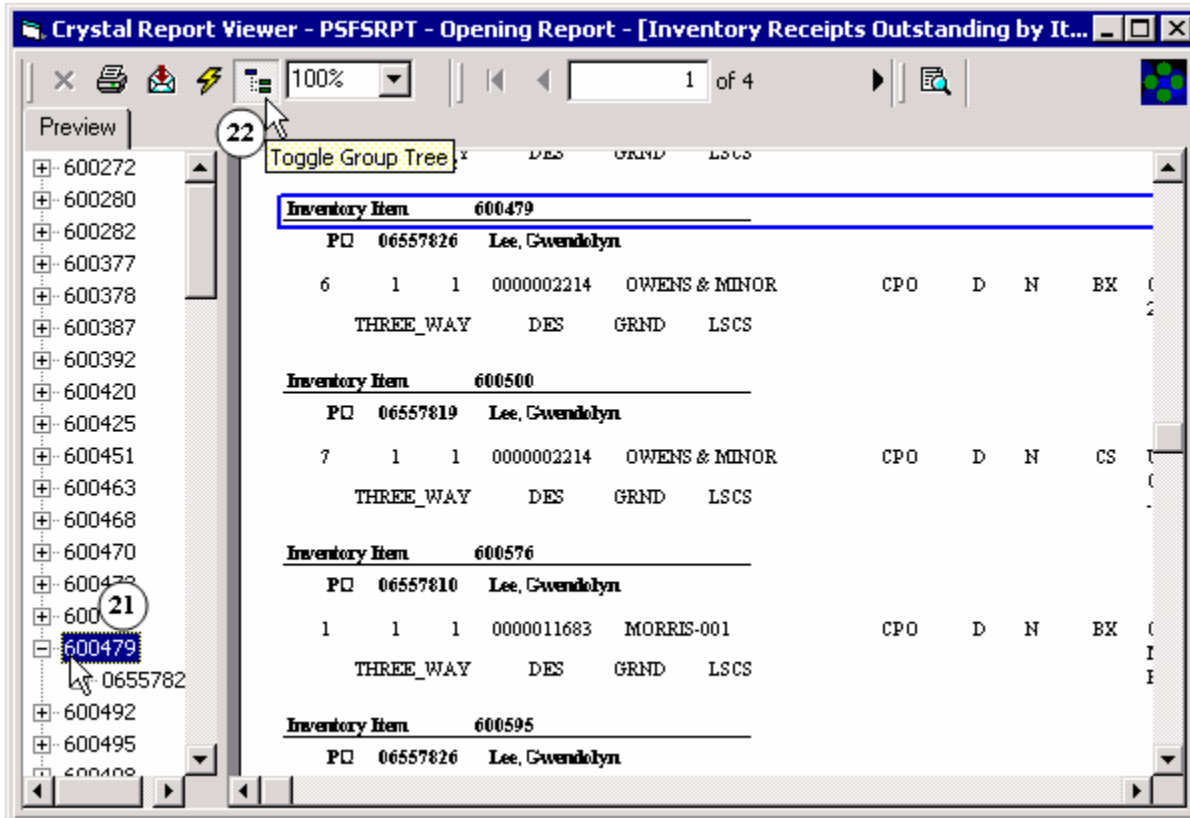
Note: Preview Tab will display all Item IDs and associated PO with PO Status of Dispatched that have a Zero (-0-) Receipt Balance and a Remaining Receipt Balance. The Report Display only shows Items and associated PO with PO Status of Dispatched with a Remaining Receipt Balance.


Before:



Step	Action
20.	With the Preview tab displayed (if not see Step 5 above) locate Item ID 600479 in the list. Notice the  Plus Symbol to the left of Item ID . This signifies that there is multiple lines to the PO. Click  and it will change to a  Minus Symbol .

After:

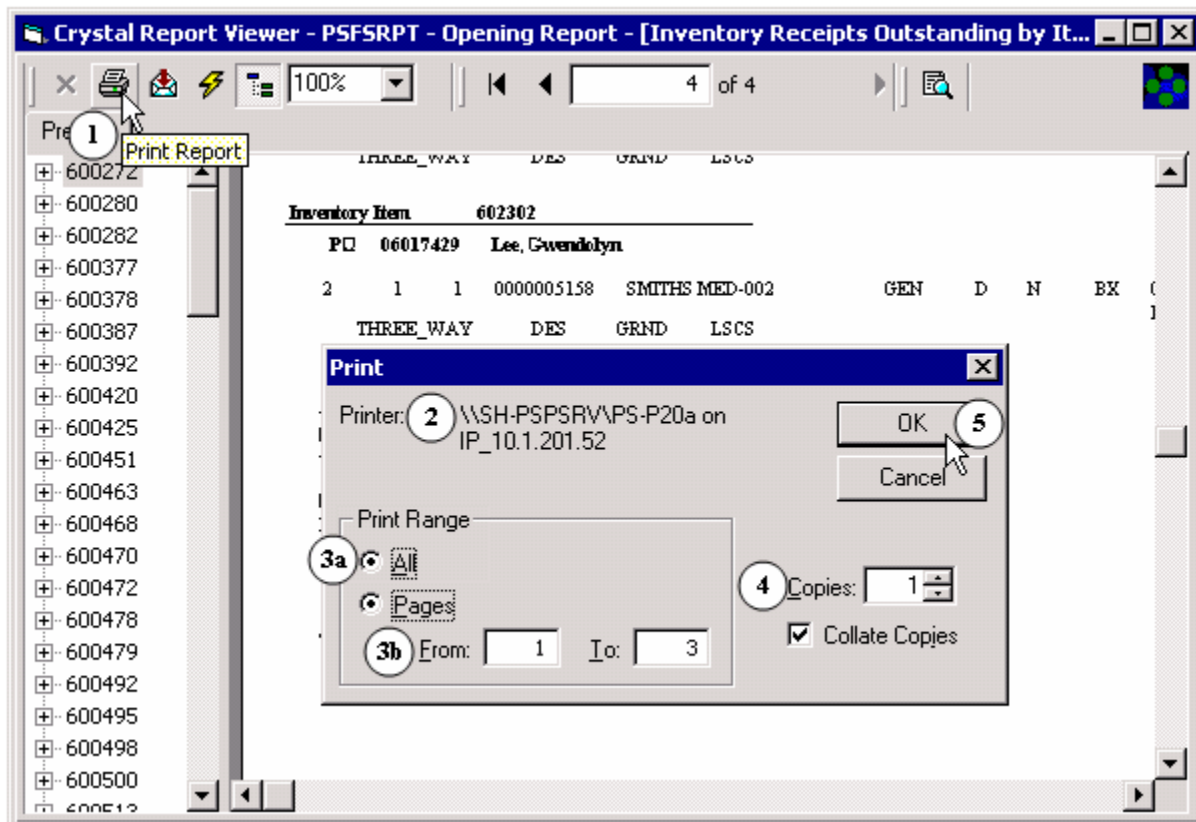




Step	Action
21.	Click on Item ID 600479 to highlight and the resulting page of the report will display with the specified Inventory Item ID outlined in blue .
22.	Click  Toggle Group Tree button to hide the Preview tab and to present a full window display of the report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.

Continue with **Printing the Inventory Receipts Outstanding by Item Report** section.

Printing the Inventory Receipts Outstanding By Item Report

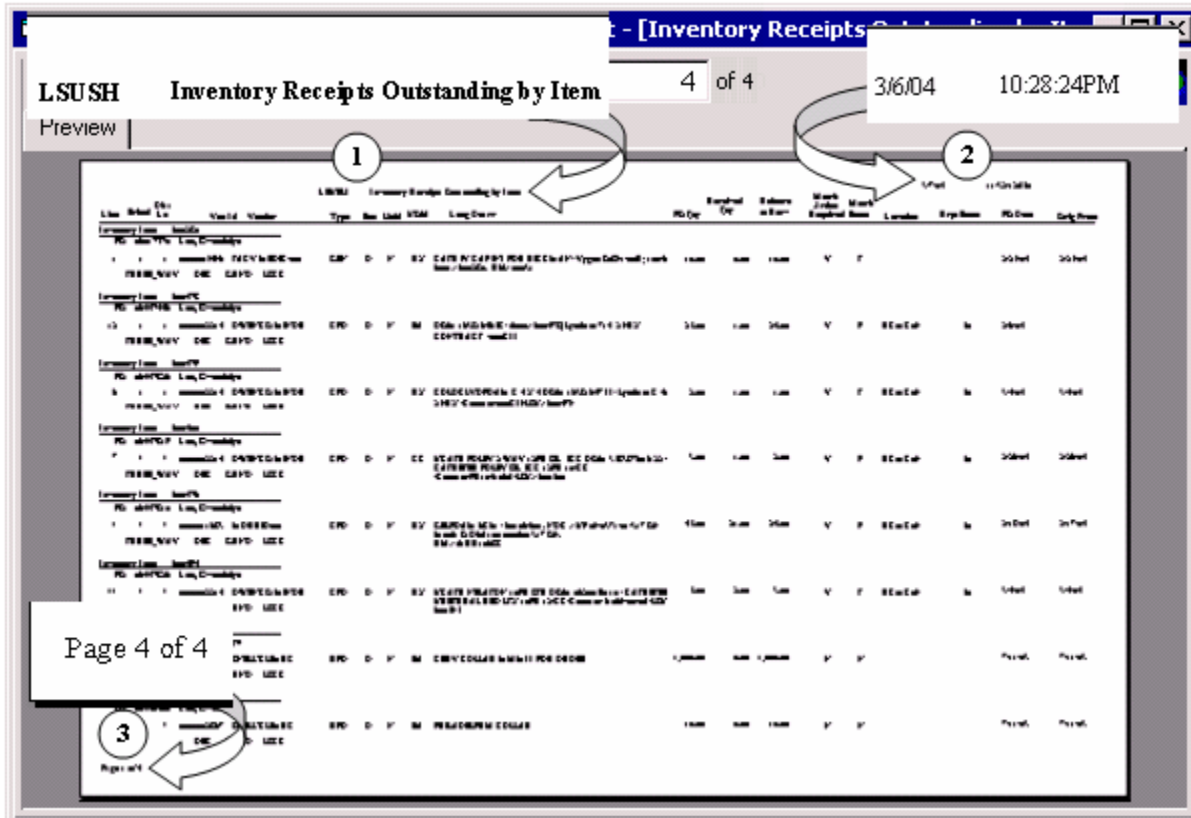
The **Crystal Report Viewer** & the **Inventory Receipts Outstanding by Item Report** displays. After viewing the report it may be necessary to print any section of the report; from a single page to a range of pages to the entire report. The viewing configuration of the report does not impact the printed report.



Step	Action
1.	Click  Print Report button to initiate the print options for a Report.
2.	The report will print to the designated Network Printer .
3.	Select Print Range desired: <ol style="list-style-type: none"> All to print the entire report Pages - From/To to print a specific range of pages
4.	Enter a number for Copies greater than 1 if desired.
5.	Click  to execute the Print options.

Continue with **Analyze the Inventory Receipts Outstanding by Item Report** section.

Analyze the Inventory Receipts Outstanding By Item Report



Each of the Inventory Reports will have three consistent items that will print on each and every page of the report.

Step	Action
1.	The Title of the Report will be on the top center of each page of the report
2.	The Date and Time the Report was run will print on the top right edge of each page of the report
3.	The Page and Total Pages of the Report will print on the bottom left of each page of the report.

Sample **Inventory Receipts Outstanding by Item** Report as displayed in the **Crystal Report Viewer**

LSUSH Inventory Receipts Outstanding by Item									
Line	Sched	Dist Ln	Ven Id	Vendor	Type	Stat	Hold	UOM	Long Descr
5		Inventory Item	602300						
4	PO	06017429		Lee, Gwendolyn					
5	3	1	1	0000005158	SMITHS MED-002	GEN	D	N	BX CHEMO SET WO/Y 20G 90D 5/8"SAFETY - 12/BX Dehlec 21-2769-24 Bid#001151 LSU #502300
6	THREE_WAY		DES	GRND	LSCS				

PO	Qty	Received Qty	Balance to Recv	Match Action Required	Match Status	Location	Rept Status	PO Date	Orig Prom
BX D 5	3.00	0.00	3.00	Y	T			2/27/04	2/27/04

The Inventory Receipts Outstanding by Item Report contains information in the body of the report that have Headings, as well as information that does not have Headings displayed at the top of each page. The information is in three steps for ease of understanding.

Step	Action
4.	Each report is first grouped by Item ID and listed in ascending order. The following do not have Headings displayed on the report: <ul style="list-style-type: none"> ▪ PO – Each PO number with a balance to receive is listed in bold print. ▪ Buyer – Each PO has Purchasing Buyer’s name in bold print.

Step	Action
5.	<p>The following do have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ Line – Individual PO Lines for the PO number with a remaining amount. ▪ Sched – PO schedule number ▪ Dist Line – Distribution Line ▪ Ven ID – Vendor number ▪ Vendor – Vendor Short Name ▪ Type – PO Type ▪ Stat – PO Status – A = Approved, D = Dispatched, O = Open ▪ Hold – PO Hold Status – Y = On Hold; N = Not on Hold ▪ UOM - Unit of Measure for goods ordered on the PO Line Distribution ▪ Long Descr – Description of goods ordered on the PO Line Distribution ▪ PO Qty – Qty on PO Line Distribution Ordered ▪ Received Qty – Qty Received on PO Line Distribution ▪ Balance to Rcv – Balance to Receive on PO Line Distribution ▪ Match Action Required – PO Match Action Required (Y = Yes; N = No). Match action should always be Y for THREE_WAY Match PO's. ▪ Match Status – PO Match Status (T = To be matched; P = Partially Matched) ▪ Location – Location goods shipped to ▪ Rcpt Status – Receipt Status – R = Received which applies to Qty already received on the PO Line Distribution; "blank" = not received. ▪ PO Date – Date PO was created ▪ Orig Prom – Original Promise date entered on the PO. Original Promise date should be entered on the PO to track vendor's promise to deliver date.
6.	<p>The following do not have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ Match Control – Match Rule designated for the PO Line Distribution. THREE_WAY = PO, Receipt and Voucher required for payment of PO Line. ▪ Freight Terms – Freight terms indicated on PO Line. ▪ Shipping Terms – Shipping Terms indicated on PO Line. ▪ INV BU – Inventory BU

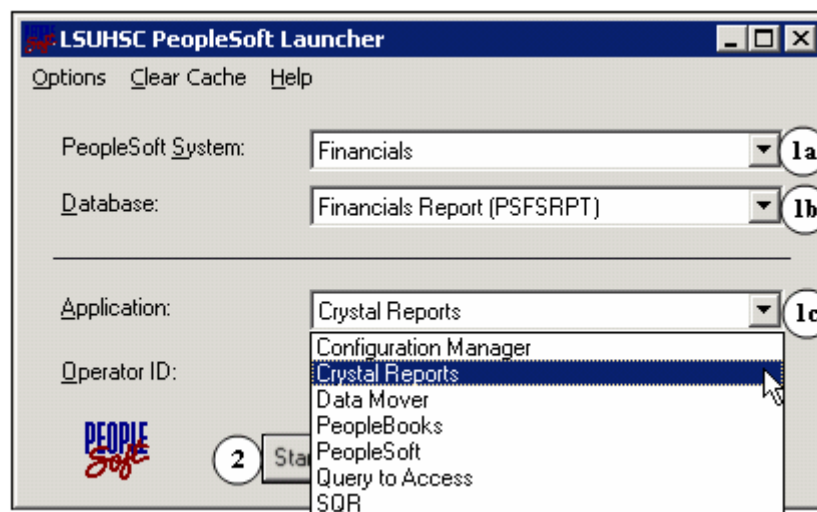
End of the **Inventory Receipts Outstanding by Item Report** section. Click [here](#) to **Return to Start of this IR.**


Report #4: Inventory Receipts Outstanding By Item - Short.

- [Access & Run the Inventory Receipts Outstanding By Item - Short Report](#)
- [Viewing the Inventory Receipts Outstanding By Item - Short Report](#)
- [Printing the Inventory Receipts Outstanding By Item - Short Report](#)
- [Analyze the Inventory Receipts Outstanding By Item - Short Report](#)

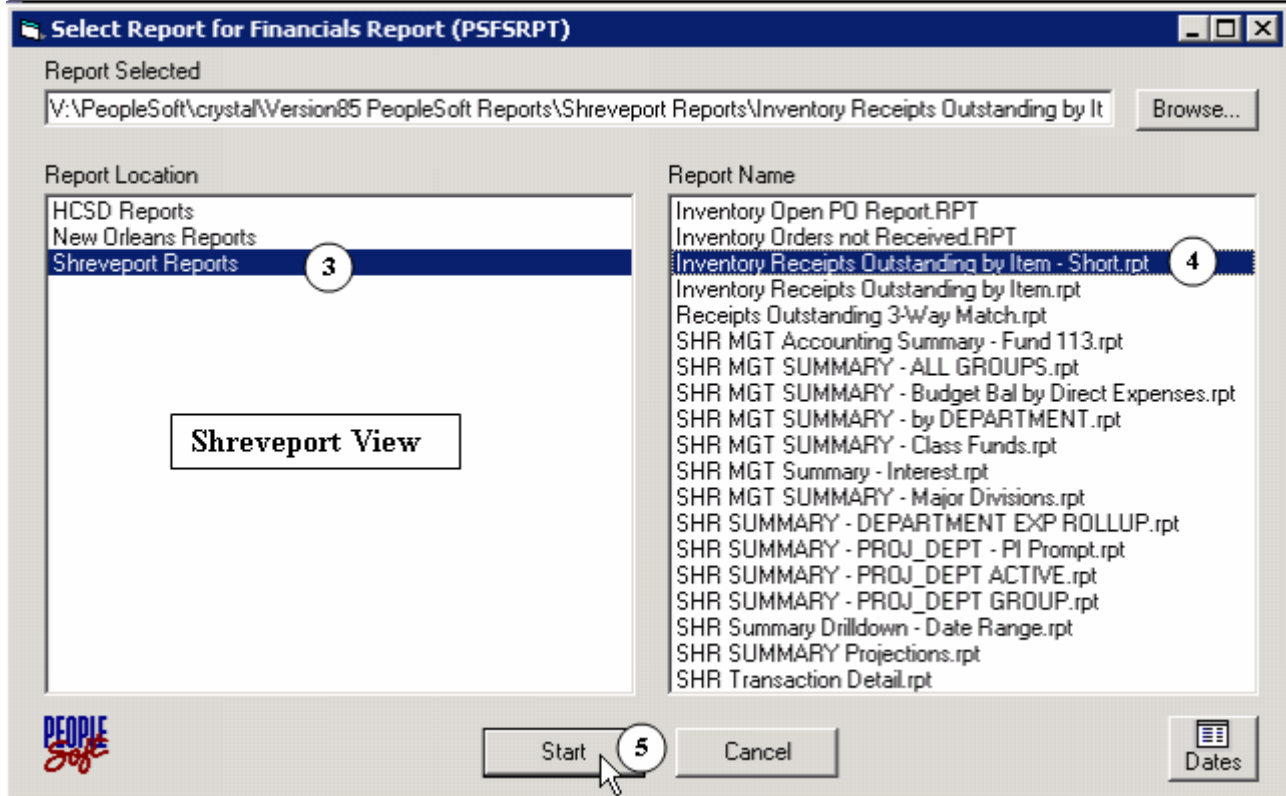
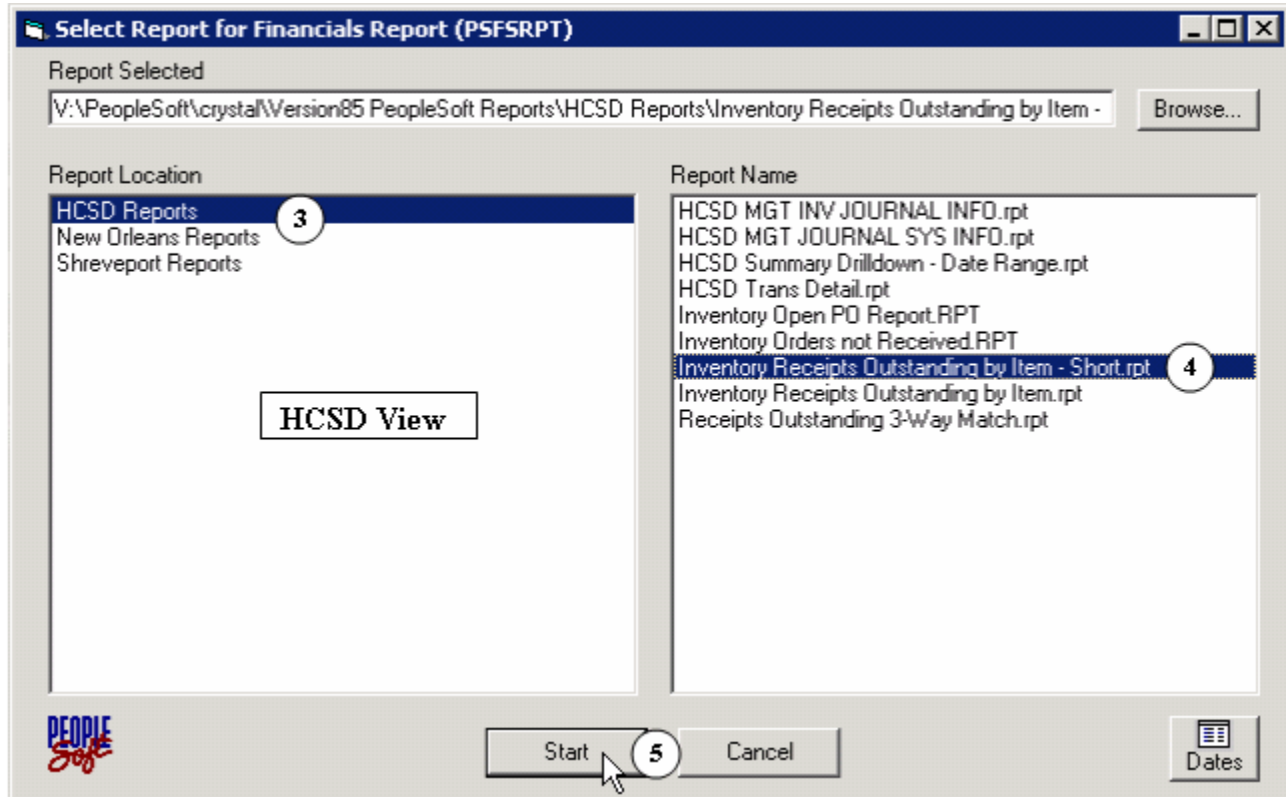
Navigation & Process


Accessing & Running the Inventory Receipts Outstanding By Item - Short Report



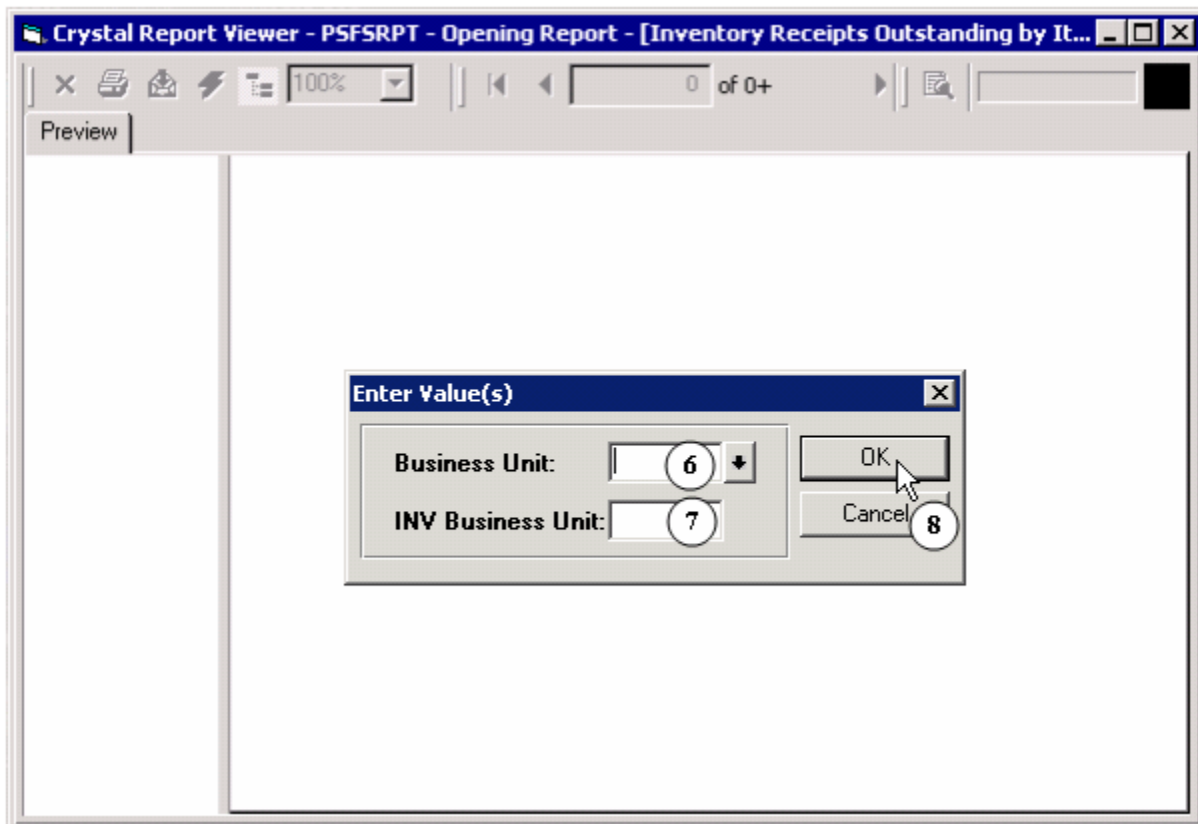
Step	Action
1.	From the LSUHSC PeopleSoft Launcher Select: <ul style="list-style-type: none"> a. PeopleSoft System: <i>Financials</i> b. Database: <i>Financials Report (PSFSRPT)</i> c. Application: <i>Crystal Reports</i>
2.	With all the proper selections made, Click the  button.


The **Select Report for Financial Report (PSFSRPT)** dialog box displays.



Step	Action
3.	From the Report Location : Select <i>HCSD Reports</i> or <i>Shreveport Reports</i>
4.	From the Report Name : Select <i>Inventory Receipts Outstanding By Item - Short</i>
5.	With all the proper selections made, Click the  button.

The **Crystal Report Viewer** window displays.



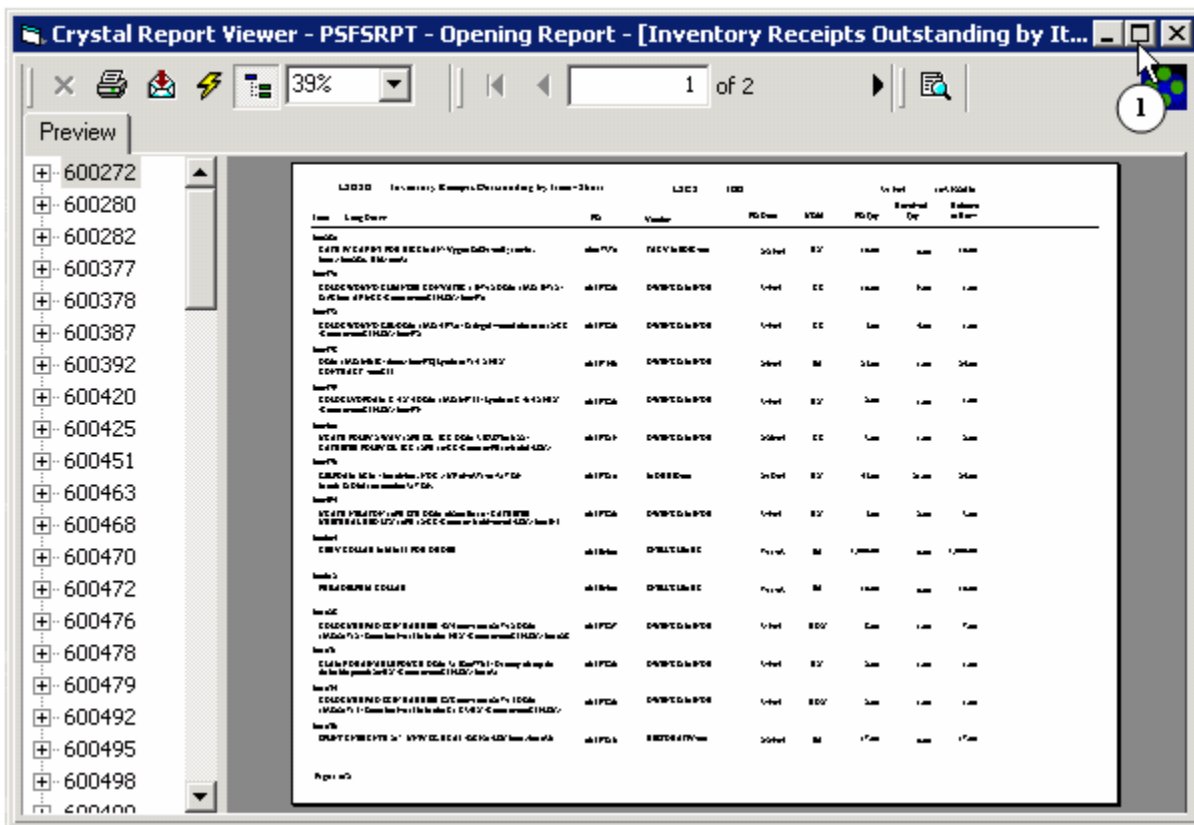
Step	Action
6.	Enter or Select Business Unit : <i>Appropriate Purchasing BU</i>
7.	Enter the INV Business Unit : <i>Appropriate Inventory BU</i>
8.	With all the proper selections made, Click the  button.


Continue with **Viewing the Inventory Receipts Outstanding By Item - Short Report** section.

Viewing the Inventory Receipts Outstanding By Item - Short Report

The **Crystal Report Viewer** with the **Inventory Receipts Outstanding by Item - Short Report** displays.

Since the report is at a less than optimal size for viewing, several features of the Crystal Report Viewer window will be discussed. All of following features may serve the End-User in viewing, printing, refreshing, or simply moving around several pages with ease. The focus of this section will be on buttons found at the top of the Crystal Report Viewer. In addition, the functional use of the Preview tab will be discussed.














Step	Action
1.	<p>It is essential to make use of the maximum use of the viewing screen available, therefore:</p> <p>Click:  the Maximize button on the Title bar</p>

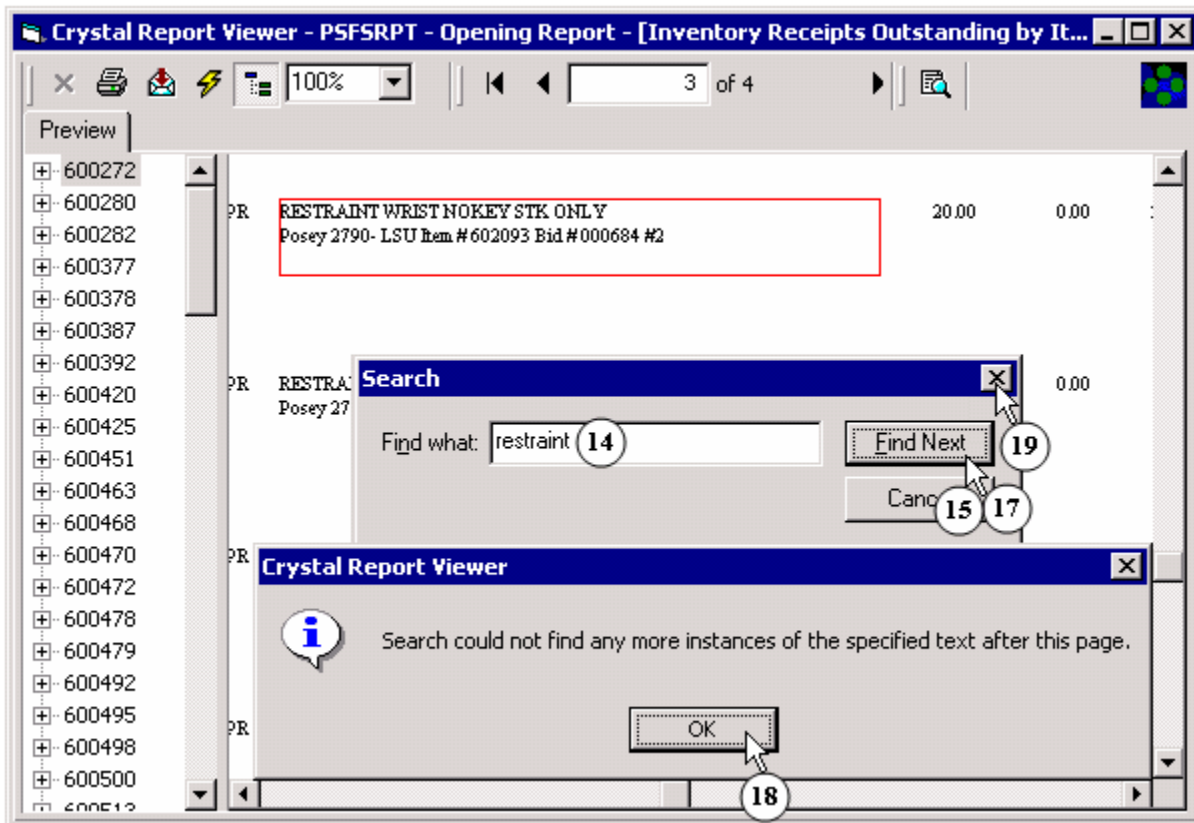
Discussion will continue with the series of **Icons** (buttons) located at the top of the Crystal Report Viewer window.




The Crystal Report Viewer Icons

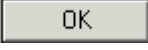



Step	Action
2.	Click  Print Report button to initiate the print options for a Report. This button will be discussed in detail in the next section.
3.	Click  Export Report button to save a copy of a report to an Acrobat Format (PDF) file and save a single or multiple pages of the report
4.	Click  Refresh button to run the similar report currently viewing but for either a different Business Unit and/or INV Business Unit without closing the Crystal Report Viewer window.
5.	Click  Toggle Group Tree button to hide the Preview tab. Turning this button off (on by default) will present a full window display of any report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.
6.	Initially the report is displayed in a percentage viewing less than 100% Click in  Zoom box to enter any (larger) percentage value so to "zoom in" to get a close-up view of your document or (less)"zoom out" to see more of the page at a reduced size. Or Click the arrow next to the Zoom box and Click the zoom setting you want to either enlarge or reduce to a value other than the current percentage viewing.
7.	Click  Go To First Page button when on any page past the first page of a multi-page report to return to the first page of the report.
8.	Click  Go To Previous Page button to view the previous page from the current page displayed.
9.	Click in  Page Number box to enter and view a specific page of a multi-page report. Type a value in the box and Press Enter key and said page of report will display.
10.	Click  Go To Next Page button to view the next page from the current page displayed.
11.	Click  Go To Last Page button when on any page of a multi-page report to return to the last page of the report.

Step	Action
12.	Click  Stop Load button if necessary to stop a report from loading after entering Business Unit and INV Business Unit values. Not available after report displays.



Step	Action
13.	Click  Search Text button to display a Search dialog box and find any item (alpha or numeric) within the report.
14.	Enter Find what entry in the Search box. Value(s) entered are not case-sensitive.
15.	Click  to begin the search process.
16.	The text will be located on any page of the report and will appear within a Red Box .
17.	Click  repeatedly to continue displaying similar entries found in the report.

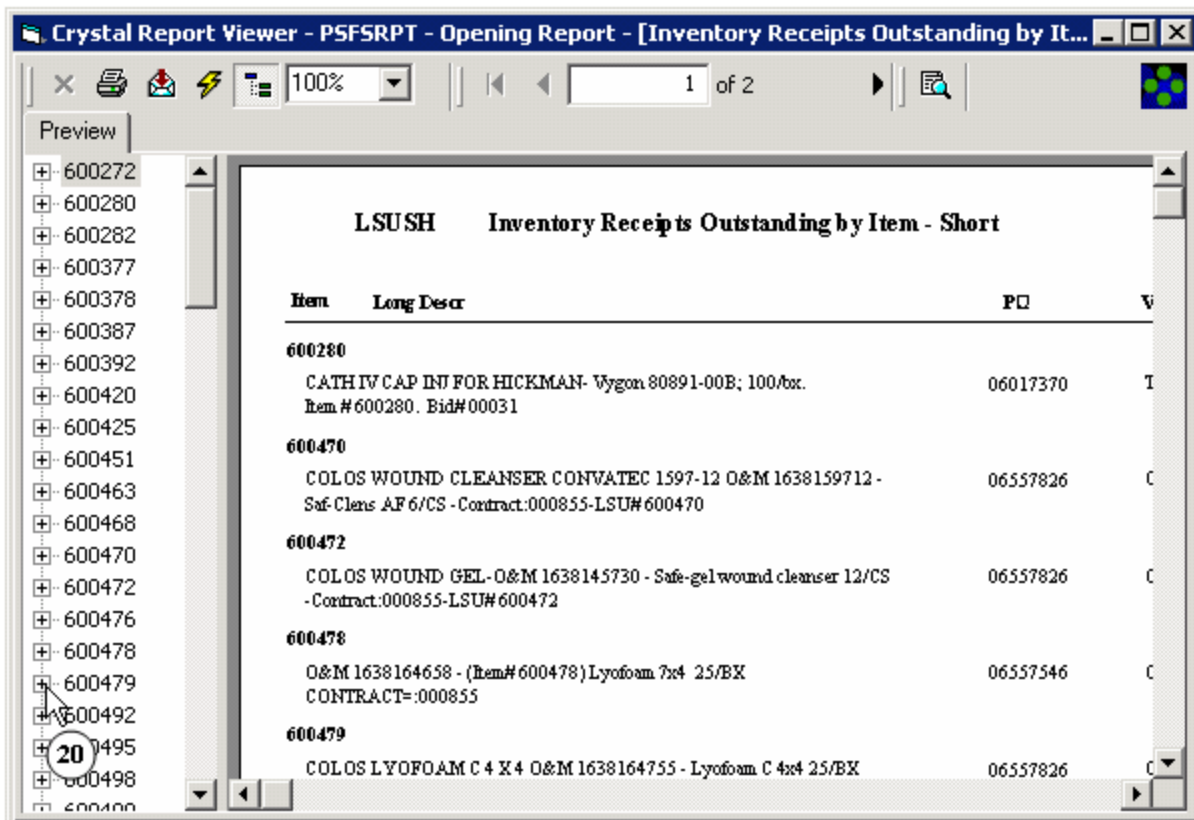
Step	Action
18.	When no further entries can be located in the report, an Information box displays. Click  to close Information box
19.	Click  Close button located on top right of Search dialog box to return to report viewing.




The next discussion will focus on utilizing the **Preview** tab of the **Crystal Report Viewer**.

If the need arises to focus on a specific **Item ID** (Inventory Item) in the report and its associated PO and PO Line, then the **Preview** tab will prove to be a time saver as oppose to viewing each page of the report. As an example, the following will illustrate the steps in locating and viewing the specific **Item ID**.

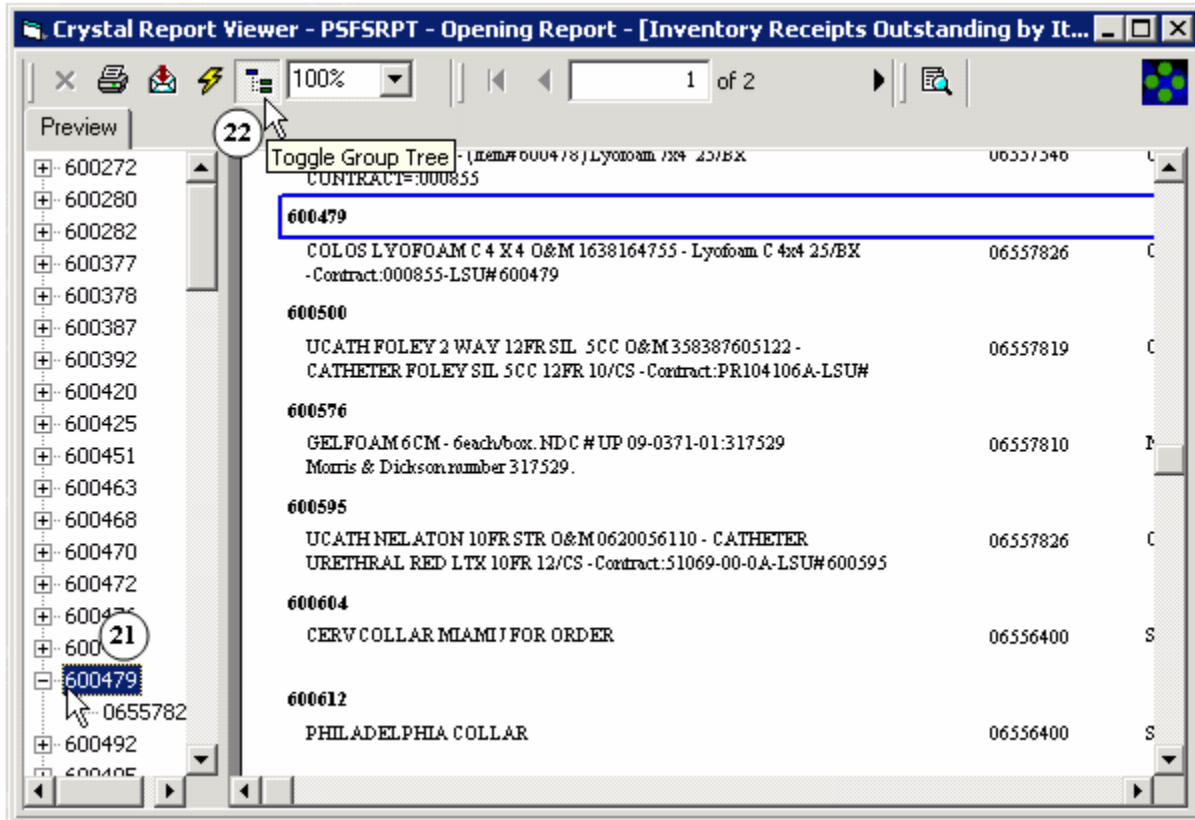
Note: Preview Tab will display all Item IDs and associated PO with PO Status of Dispatched that have a Zero (-0-) Receipt Balance and a Remaining Receipt Balance. The Report Display only shows Items and associated PO with PO Status of Dispatched with a Remaining Receipt Balance.


Before:



Step	Action
20.	With the Preview tab displayed (if not see Step 5 above) locate Item ID 600479 in the list. Notice the  Plus Symbol to the left of Item ID . This signifies that there is multiple lines to the PO. Click  and it will change to a  Minus Symbol .

After:



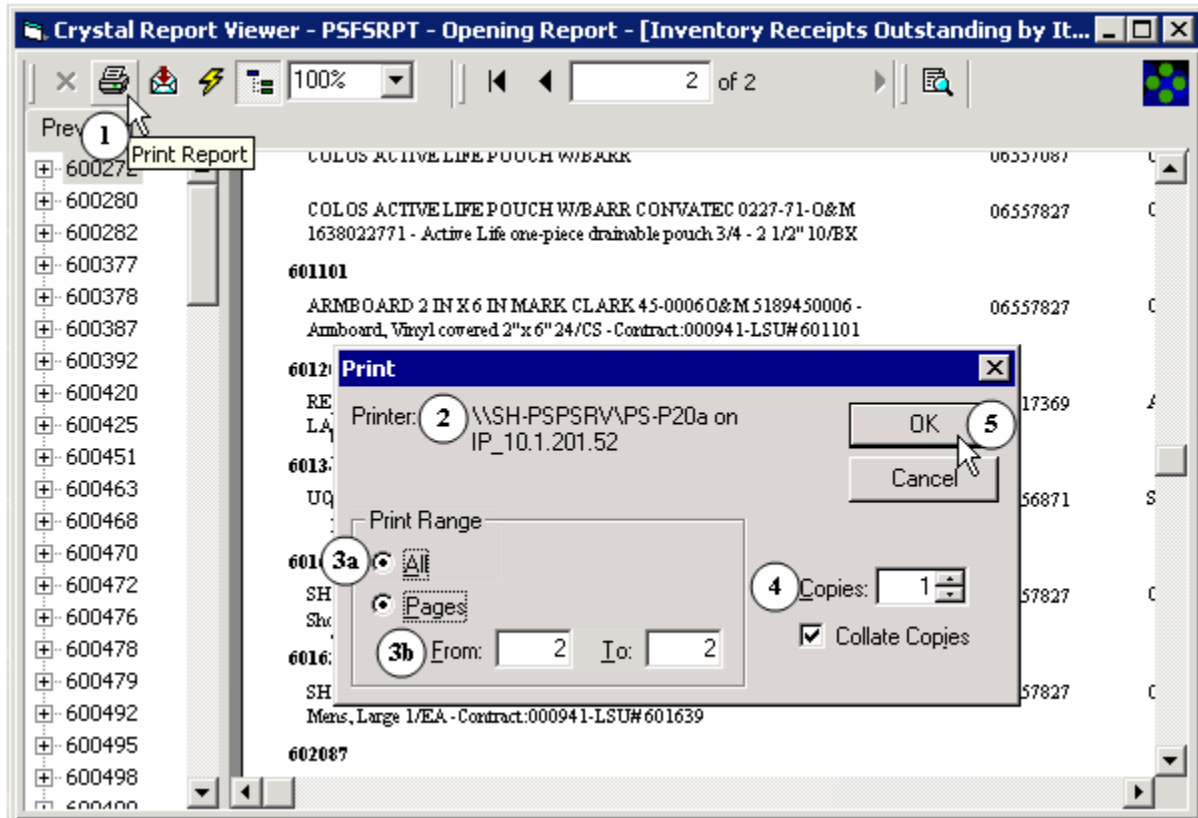
Step	Action
21.	Click on Item ID 600479 to highlight and the resulting page of the report will display with the specified Inventory Item ID outlined in blue.
22.	Click  Toggle Group Tree button to hide the Preview tab and to present a full window display of the report in the Crystal Report Viewer . To redisplay the Preview tab click this button back on.



Continue with **Printing the Inventory Receipts Outstanding by Item Report** section.

Printing the Inventory Receipts Outstanding By Item - Short Report

The **Crystal Report Viewer** & the **Inventory Receipts Outstanding by Item - Short Report** displays.

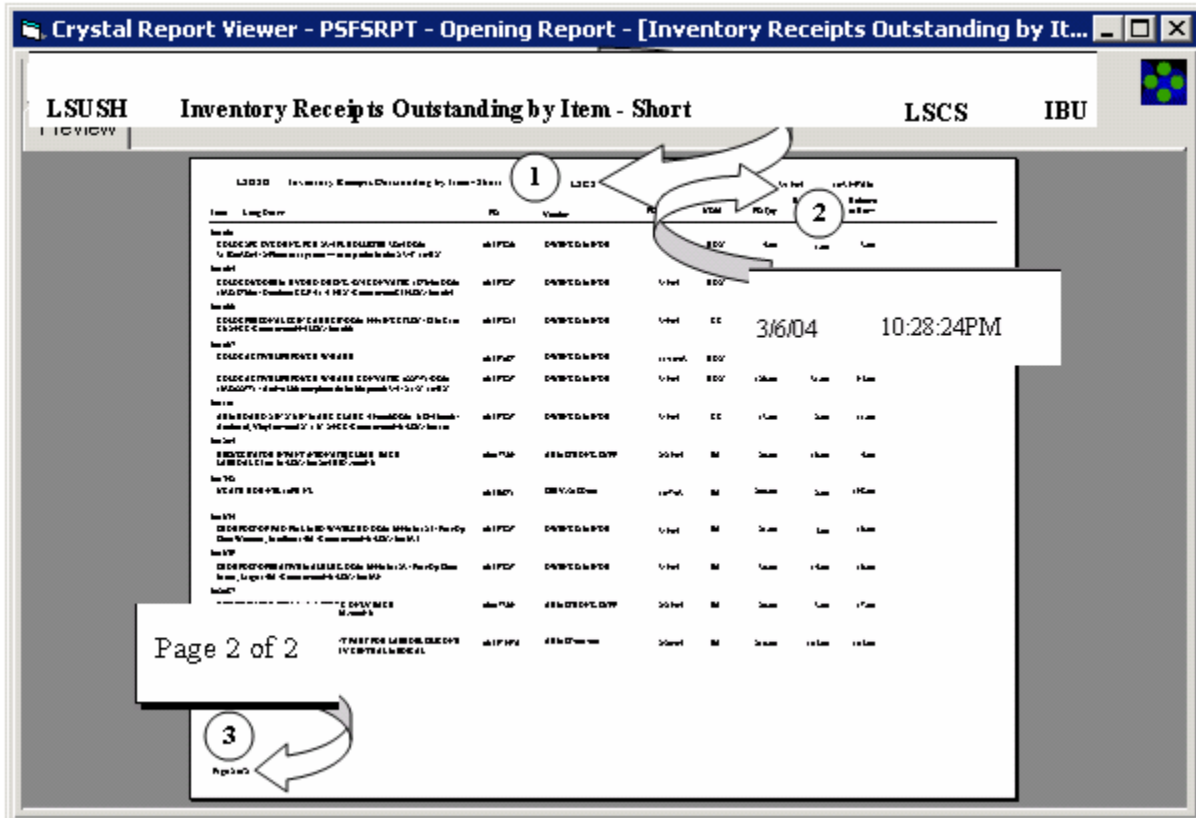
After viewing the report it may be necessary to print any section of the report; from a single page to a range of pages to the entire report. The viewing configuration of the report does not impact the printed report.



Step	Action
1.	Click  Print Report button to initiate the print options for a Report.
2.	The report will print to the designated Network Printer .
3.	Select Print Range desired: <ol style="list-style-type: none"> All to print the entire report Pages - From/To to print a specific range of pages
4.	Enter a number for Copies greater than 1 if desired.
5.	Click  to execute the Print options.

Continue with **Analyze the Inventory Receipts Outstanding by Item - Short Report** section.

Analyze the Inventory Receipts Outstanding By Item - Short Report



Each of the Inventory Reports will have three consistent items that will print on each and every page of the report.

Step	Action
1.	The Title of the Report will be on the top center of each page of the report The Inventory Business Unit (IBU) is included in the Title of this report.
2.	The Date and Time the Report was run will print on the top right edge of each page of the report
3.	The Page and Total Pages of the Report will print on the bottom left of each page of the report.

Sample **Inventory Receipts Outstanding by Item - Short Report** as displayed in the **Crystal Report Viewer**

Item 4 Long Descr	PO
601061	
4 COLOS 2PC SYS DRNG PCH 23/4 FL HOLLISTER 3804 O&M 3158003804 - 2-Piece ost system w/ transp odor barrier 2 3/4" 10/BX	06557826
601064	
COLOS DUODERM HYDRO DRSNG 4X4 CONVATEC 1876-60 O&M 1638187660 - Duoderm CGF 4 x 4 5/BX -Contract:000855-LSU# 601064	06557827

Vendor 4	PO Date	UOM	PO Qty	Received Qty	Balance to Rcv
OWENS & MINOR 4	3/4/04	BOX	4.00	1.00	3.00
OWENS & MINOR	3/5/04	BOX	98.00	90.00	8.00

The Inventory Receipts Outstanding by Item - Short Report contains information in the body of the report that have Headings.

Step	Action
4.	<p>Each report is first grouped by Item ID and listed in ascending order.</p> <p>The following do have Headings displayed on the report:</p> <ul style="list-style-type: none"> ▪ Item – Individual Inventory Item ID with a remaining amount. ▪ Long Descr – Description of goods ordered on the PO Line Distribution ▪ PO – Each PO number with a balance to receive is listed in bold print. ▪ Vendor – Vendor Short Name ▪ PO Date – Date PO was created ▪ UOM - Unit of Measure for goods ordered on the PO Line Distribution ▪ PO Qty – Qty on PO Line Distribution Ordered ▪ Received Qty – Qty Received on PO Line Distribution ▪ Balance to Rcv – Balance to Receive on PO Line Distribution

End of the **Inventory Receipts Outstanding by Item - Short Report** section. Click [here](#) to **Return to Start of this IR.**

Retrieval Name: Information Release - #13
Issue Date: March 18, 2004
Revision Date:
Originator: Financial Support Organization
Rescind Date:



Questions/Comments:

Refer all questions or comments via e-mail to the **PS FIN SUPPORT GROUP**.