



Quick Reference Guide – CSU PO Life Cycle Report

Purpose

The CSU PO Life Cycle Report provides detailed information for a transaction as it flows through the PO and AP systems. Campus users who have access in PeopleSoft can run the report by **Requisition#**, **Purchase Order#** or **Voucher#**. The CSU PO Life Cycle Report is a PDF format and answers questions like:

- Has this req. been assigned? If so, what is the PO#?
- Is there a Voucher for this? If so, what is the Voucher#?
- Has the Voucher been paid? If so, what is the Check#?

Step 1 - Create a Run Control

Navigation: Purchasing > Purchase Orders > Reports > CSU PO Life Cycle Report

You may already have a run control that will work, first try the “Find an Existing Value” tab.

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Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

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Find an Existing Value Add a New Value

Run Control ID PO_LIFECYCLE

Add

Step 2 - Run the CSU PO Life Cycle Report

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Run Control ID PO_LIFECYCLE Report Manager Process Monitor Run

Select PO using:

Purchase Order Requisition Voucher

Process Options

*Business Unit: SMCMP

*Req ID: 0000014047

Save Return to Search Previous in List Next in List Add Update/Display



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If the Req ID does not pull up it indicates the PO was not created. Was the Req Budget Checked?

Step 3 - Go to Process Monitor to review the report.

Navigation: PeopleTools > Process Scheduler > Process Monitor

Click on the Details hyperlink, and next screen click View Log/Trace, and next screen click on the PDF link.

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	14383645		SQR Report	CSUPO010		05/29/2018 4:29:57PM PDT	Queued	N/A	Details
<input type="checkbox"/>	14381094		PSJob	CSUFS01J		05/29/2018 1:32:22PM PDT	Success	Posted	Details

Step 4- Review the CSU PO Life Cycle Report results

This report works very well for blanket POs. Please note the Requestor ID in the report is not the complete ID number therefore this one field is not informative. This report does not replace the Notice To Proceed process.

Report ID: CSUPO010
Operator : 681002
Database : PCFSPRD

Cal State San Marcos
Purchase Order Life Cycle Report

Page No : 1
Run Date: 05/16/2018
Run Time: 14:34:02

Bus Unit: SMCMP
PO Id: 0000014749
PO Dt: 05/16/2017
Supplier Id: 0000009392
Supplier Name: SOUTH CST KEYBOARDS INC

PO Ref: Copied from REQ 14047
PO Type: General
PO Buyer: 680007
PO Status: Compl

Change Order #: 000
Change Order Date:

Requisition Information:

Req Id	Ln/Sc/Ds	Status	Description	Categ Cd	Requestor	Acctn /Dept Id	/Fund /Prog /Project Id/Class	Price	UOM	QTY	PO Ln/Sc/Ds	Total Amount
0000014047	1/1/1	Processed	NEW	Sons Gr	58000	680007419 619804/1030	/96015/ /86719 /	135,792.00	LOT	1.0	1/1/1	130,360.32
0000014047	1/1/2	Processed	NEW	Sons Gr	58000	680007419 619804/1173	/48500/ / /	135,792.00	LOT	0.0	1/1/2	5,431.68
0000014047	2/1/1	Processed	Delivery & Set up - Gr	58000	680007419 619804/1030	/96015/ /86719 /	185.00	LOT	1.0	2/1/1	177.60	
0000014047	2/1/2	Processed	Delivery & Set up - Gr	58000	680007419 619804/1173	/48500/ / /	185.00	LOT	0.0	2/1/2	7.40	
Total REQ												135,977.00

PO Detail Information 0000014749 - 05/16/2017

Ln/Sc/Ds	Stat	Description	Categ	Due Date	Location	Acctn /Dept Id	/Fund /Prog /Project Id/Class	Price	UOM	QTY	Total Tax	Total Prg	Total Msc	Total Amount
1/1/1	Comp	NEW	So	00041 07/31/2017	SMCAMPUS	619804/1030	/96015/ /86719 /	135,792.00	LOT	1.0	10,102.92	0.00	0.00	140,463.24
1/1/2	Comp	NEW	So	00041 07/31/2017	SMCAMPUS	619804/1173	/48500/ / /	135,792.00	LOT	0.0	420.96	0.00	0.00	5,852.64
2/1/1	Comp	Delivery & Set up	00041 07/31/2017	SMCAMPUS	619804/1030	/96015/ /86719 /	185.00	LOT	1.0	0.00	0.00	0.00	177.60	
2/1/2	Comp	Delivery & Set up	00041 07/31/2017	SMCAMPUS	619804/1173	/48500/ / /	185.00	LOT	0.0	0.00	0.00	0.00	7.40	
Total PO												146,500.88		

Voucher Information:

Voucher ID	Status	Voucher Amount	Voucher Dt	Invoice ID	PO Ln/Sc/Ds	Acctn /Dept Id	/Fund /Prog /Project Id/Class	Check#	Check Dt	Check Amount	
00195788	Open	140,463.24	07/01/2017	41817SSSD	1/1/1	619804/1030	/96015/ /86719 /	221579	08/08/2017	146,500.88	
00195788	Open	5,852.64	07/01/2017	41817SSSD	1/1/2	619804/1173	/48500/ / /	221579	08/08/2017	146,500.88	
00195788	Open	177.60	07/01/2017	41817SSSD	2/1/1	619804/1030	/96015/ /86719 /	221579	08/08/2017	146,500.88	
00195788	Open	7.40	07/01/2017	41817SSSD	2/1/2	619804/1173	/48500/ / /	221579	08/08/2017	146,500.88	
Total VCH											146,500.88

Check information

The chartfield detail for each line