Ariba / Guided BUying Reporting Workshop Agenda: Answer These Questions

Question	Recommendation
What outcome can you expect upon completing today's workshop?	We will use an essential set of BW reporting functions to explore two reports to answer a broad range of questions related to procurement data
What are the essential BW functions?	Filtering, organizing data based on column position, adding a subtotal or grand total, saving a modified report and undo
What if I can't figure out how to answer a question when this workshop is over?	Use online Help or send email to ithelp@bu.edu
What Sourcing & Procurement help is available to me? Where is it?	Refer to Sourcing & Procurement's How to Place Orders tab (https://www.bu.edu/sourcing/h2po/) Use link on BUworks home page or search for Sourcing Help from BU home page
What reporting environment is best to view my purchasing activity?	Consider what to examine. Do you need to view: • All purchasing activity (potentially multiple shoppers) for your Funds Center? ➔ Business Warehouse • A list of only the items you have purchased as a Requisitioner? ➔ **Guided BUying** home page under "Your Requests"
What report is best to view my purchasing activity within the BW environment?	Most often: *Purchasing Document Lifecycle (PDL)* report Periodically: *BU Spend (BUS)* report

Category	Question	Recommended Report / Method
PR	Who created the Purchase Requisition (PR)?	Purchasing Document Lifecycle (PDL) – add **Shopper**
PR	What was the PR number? (I didn't write it down)	PDL
PR	When was this PR created?	PDL – add **SC/PR Creation Date**
PR	What were the contents of the PR?	PDL – add **PR Item Description** or **PO Item Description**
PR	What is the PO Number associated with this PR?	PDL
PR	Which cost center was the PR charged to?	PDL
PR	Which internal order was the PR charged to?	PDL
PR	What is the status of my PR?	PDL
PR	Where is the PR in the approval process?	PDL
PR	Who approved this PR?	Use Ariba to learn who still needs to approve the PR (future action)
BW	How can I undo something I just did?	Back/Back one navigation step
BW	How can I organize my data by selected fields?	Change column order
BW	How can I manually add a subtotal (by vendor, date, etc.)?	Add subtotal (Help is available)
BW	How can I manually add a grand total to my report?	Add grand total (Help is available)
BW	How can I use the filter command to focus on any subset of data?	Inclusive/exclusive filters; long-form and short-form filters
Break / in-class assignment – Your turn!		
Vendor	How much have we spent with vendors we have used this FY?	Use PDL for this assignment
Vendor	Which are the top 3 vendors we have done business with?	

Category	Question	Recommended Report / Method
Vendor	What vendor was an item purchased from?	
Vendor	Has this vendor been paid? If so, when were they paid?	PDL – (1) use **Paid** Key Figure or (2) use **Clearing #** and **Clearing Date**
Invoice	Has an invoice been submitted for this PO?	PDL
Invoice	What is the vendor invoice number associated with this PO?	PDL
Invoice	Are P-Card and Concur transactions included in PDL and BUS?	P-Card data is not available in either report. BUS contains Concur data, but PDL does not. FM Transaction Detail report is recommended for viewing either of these transaction types
PO	How can I view activity by month?	PDL – add **FM Posting Date** and filter by month. Note that there are other date fields that may be more appropriate to your needs
PO	Is this PO closed?	PDL – add **PO Closed Indicator** or **Final Invoice Indicator**
PO	Can I save a report once I have modified it the way I want it?	Yes, but may not be useful for most shopping situations; review video (search online help; use Terrier eDev)
PO	How much were the shipping costs?	Run BU Spend (BUS) – expand **Total Invoice Amount** Key Figure to view **Delivery Costs**