

## 13a\_Find Purchase Order Report

- Purpose:*** The purpose of this task is to search for purchase orders in Workday, regardless of who created the PO.
- How to Access:*** Enter **Find Purchase Orders** in the Workday **Search** field, press **Enter**, and click **Find Purchase Orders** from the *Search Results* section.
- Audience:*** Buyers and Approvers (Cost Center and Program Managers)
- Helpful Hints:***
- Be sure to keep in mind that only select users will have access to this report in Workday. If you are not authorized, you will not be able to access this Workday task. (Contact your Finance Partner, if you do not have access and believe you should.)
  - Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.
- Procedure:*** Complete the following steps to execute the Find Purchase Orders report.

Find Purchase Orders

### Find Purchase Orders

Company	<input type="text"/>
Supplier	<input type="text"/>
Buyer	<input type="text"/>
Purchase Order	<input type="text"/>
Document Date On or After	<input type="text" value="06 / 05 / 2017"/> 
Document Date On or Before	<input type="text" value="MM / DD / YYYY"/> 
Due Date On or After	<input type="text" value="MM / DD / YYYY"/> 
Due Date On or Before	<input type="text" value="MM / DD / YYYY"/> 
Status	<input type="text"/>
Issue Options	<input type="text"/>
Contract	<input type="text"/>
Requisition	<input type="text"/>
Requester	<input type="text"/>
Invoice	<input type="text"/>
Created by Worker	<input type="text"/>
Approving Worker	<input type="text"/>

OK
Cancel

1. As required, complete the following fields:

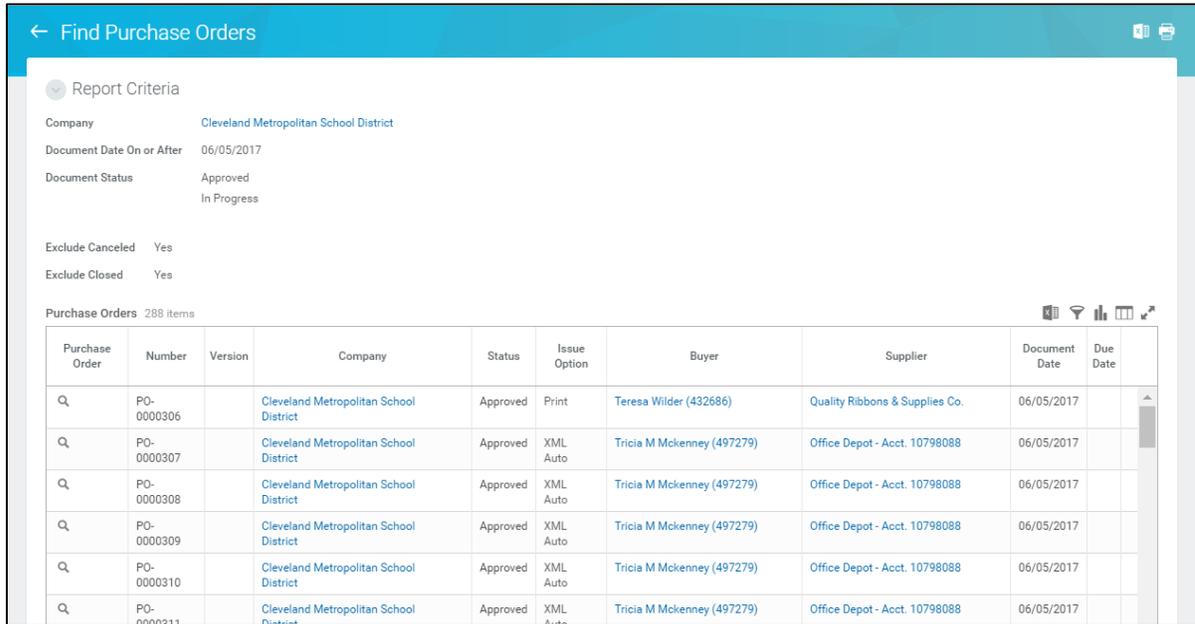
Field Name	Required / Optional	Description
Supplier	Optional	Identifies the supplier listed in the Purchase Order.
Buyer	Optional	Identifies the Buyer who created the Purchase Order.
Purchase Order	Optional	Identifies the Purchase Order number for the orders you are looking for.
Document Date On or After	Optional/ Required	Identifies the date that you want to see all Purchase Orders that have been created by or after. <b>Note:</b> It is required to use one of the date fields.
Document Date On or Before	Optional/ Required	Identifies the date that you want to see all Purchase Orders that have been created by or before. <b>Note:</b> It is required to use one of the date fields.
Status	Optional	Indicates the status of the Purchase Orders that you are looking for.

Field Name	Required / Optional	Description
<b>Worktags</b>	Optional	Indicates specific worktags to view all Purchase Orders for.

**Note:** Enter as much selection criteria as possible to limit your report results.

- Click **OK** to continue to execute the report.

### Find Purchase Orders - Results



← Find Purchase Orders

Report Criteria

Company: Cleveland Metropolitan School District

Document Date On or After: 06/05/2017

Document Status: Approved  
In Progress

Exclude Canceled: Yes

Exclude Closed: Yes

Purchase Orders: 288 items

Purchase Order	Number	Version	Company	Status	Issue Option	Buyer	Supplier	Document Date	Due Date
Q	PO-0000306		Cleveland Metropolitan School District	Approved	Print	Teresa Wilder (432686)	Quality Ribbons & Supplies Co.	06/05/2017	
Q	PO-0000307		Cleveland Metropolitan School District	Approved	XML Auto	Tricia M Mckenney (497279)	Office Depot - Acct. 10798088	06/05/2017	
Q	PO-0000308		Cleveland Metropolitan School District	Approved	XML Auto	Tricia M Mckenney (497279)	Office Depot - Acct. 10798088	06/05/2017	
Q	PO-0000309		Cleveland Metropolitan School District	Approved	XML Auto	Tricia M Mckenney (497279)	Office Depot - Acct. 10798088	06/05/2017	
Q	PO-0000310		Cleveland Metropolitan School District	Approved	XML Auto	Tricia M Mckenney (497279)	Office Depot - Acct. 10798088	06/05/2017	
Q	PO-0000311		Cleveland Metropolitan School District	Approved	XML Auto	Tricia M Mckenney (497279)	Office Depot - Acct. 10798088	06/05/2017	

- As required, review the following fields to analyze the report results:

Field Name	Required / Optional	Description
<b>Number</b>	Required	Indicates the Purchase Order number.
<b>Status</b>	Required	Indicates the current status of the Purchase Order.
<b>Issue Option</b>	Required	Indicates how the Purchase Order will be sent to the Supplier.
<b>Buyer</b>	Required	Identifies the Buyer responsible for the Purchase Order.
<b>Supplier</b>	Required	Identifies the Supplier filling the Purchase Order.
<b>Document Date</b>	Required	Identifies the creation date of the Purchase Order.
<b>Amount</b>	Required	Indicates the total amount for the Purchase Order.

Field Name	Required / Optional	Description
Supplier Contract	Optional	Indicates if a Supplier Contract is associated to the Purchase Order.
Business Document	Optional	Identifies if other business documents have been generated for the Purchase Order. Examples include: <ul style="list-style-type: none"> <li>• Receipt</li> <li>• Return Order</li> <li>• Change Order</li> <li>• Invoice</li> </ul>

**Note:** Fields containing Blue text indicates that you can click on the value and “drill-down” for additional information.

**Note:** It is also possible to export the report results to Microsoft Excel by clicking  .

4. You have executed the Find Purchase Orders report, as required, click  to return to the initial screen and modify your selection criteria to re-run the report.

**Result:**

You have successfully searched for Purchase Orders.