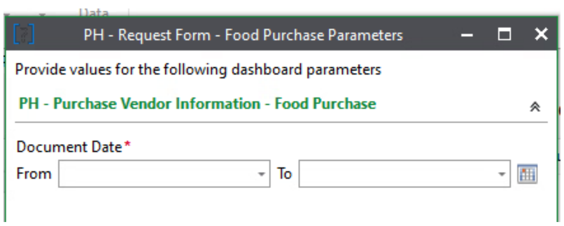
**NOTE: PHASE 2 REPORTING CAPABILITIES WERE NOT IMPLEMENTED UNTIL OCTOBER 2, 2024; THEREFORE, REPORTS RUN FOR FY 25 WILL NOT BE COMPLETE—JULY-SEPTEMBER DATA WILL NOT BE INCLUDED. IN SOME INSTANCES, THAT INFORMATION CAN BE OBTAINED THROUGH CUSTOM QUERIES OR RETRIEVAL UNDER THE HOME TAB.**

# PH – Purchase Portal Reports

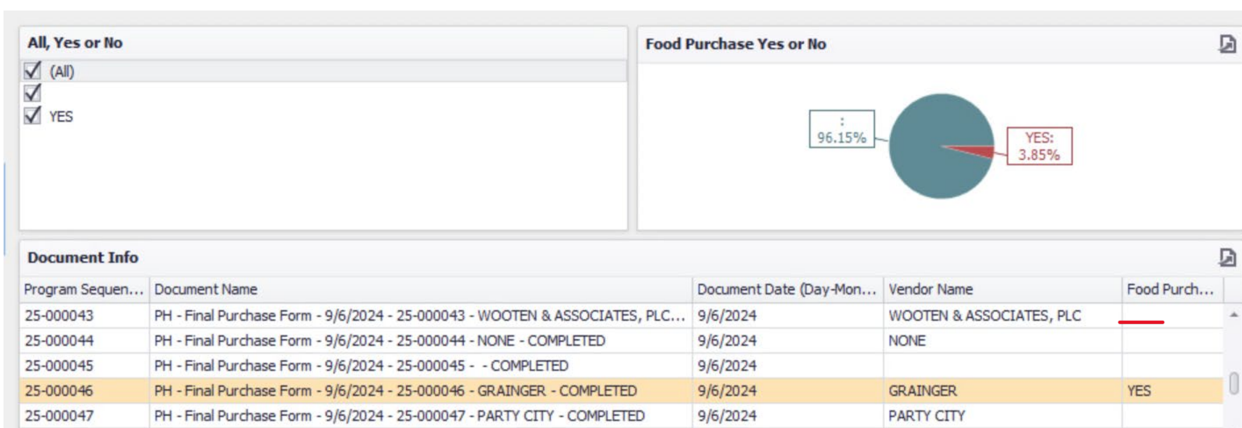
The reports are found under the Reporting icon in OnBase. Under the Shared with Me tab is a section for Public Health and the below reports are included in that section.

## PH – Request Form – Food Purchase

When selecting this report, users are prompted to enter a date range.




The report will gather all the PH – Final Purchase Forms for the date range. This report can break down if the Food Purchase check box on the form was checked. A check signifies a "yes"

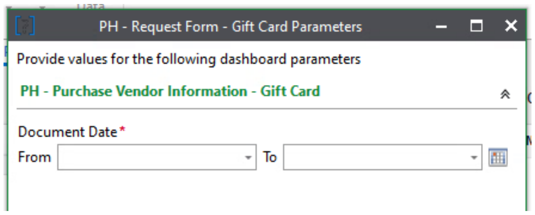



The report is broken up into three sections. The top left section allows users to filter check; all will show all the documents, yes will show the documents where the check box is selected. The other sections will change based on what is selected.

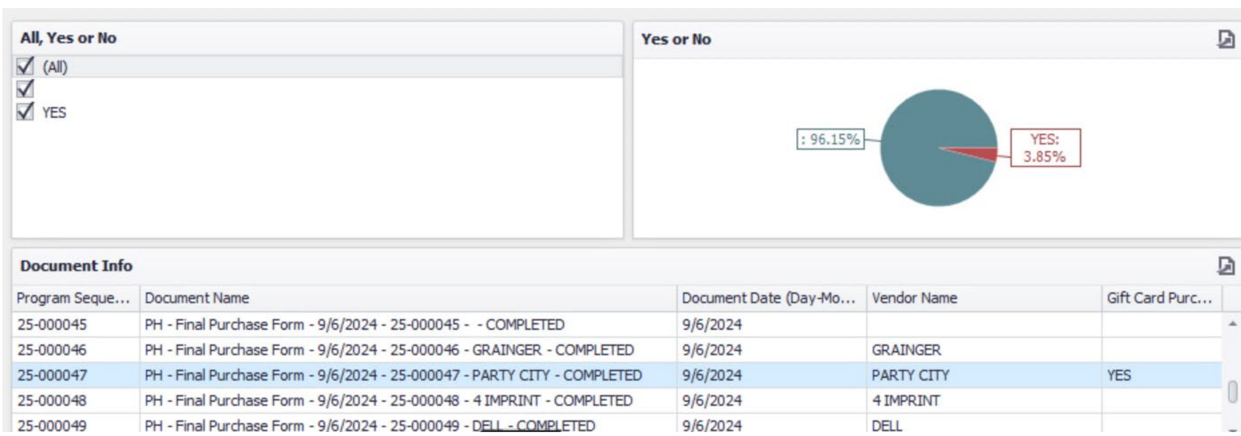
The bottom grid lists information about each Final Purchase Forms, Program Sequence, date, vendor. Users can double click on the item, and it will open the form. If users need to export the grid, they can use the small icon in the right-hand side of the grid and can export the information.

**PH – Request Form – Gift Card**

When selecting this report, users are prompted to enter a date range.




The report will gather all of the PH – Final Purchase Forms for the date range. This report can break down if the Gift Card check box on the form was checked. A check signifies a "yes"

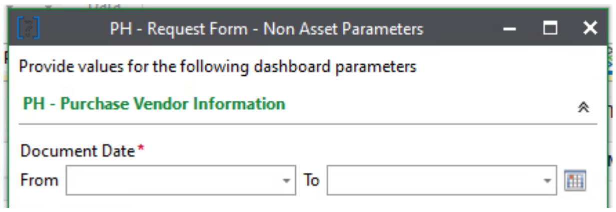



The report is broken up into three sections. The top left section allows users to filter check; all will show all the documents, yes will show the documents where the check box is selected. The other sections will change based on what is selected.

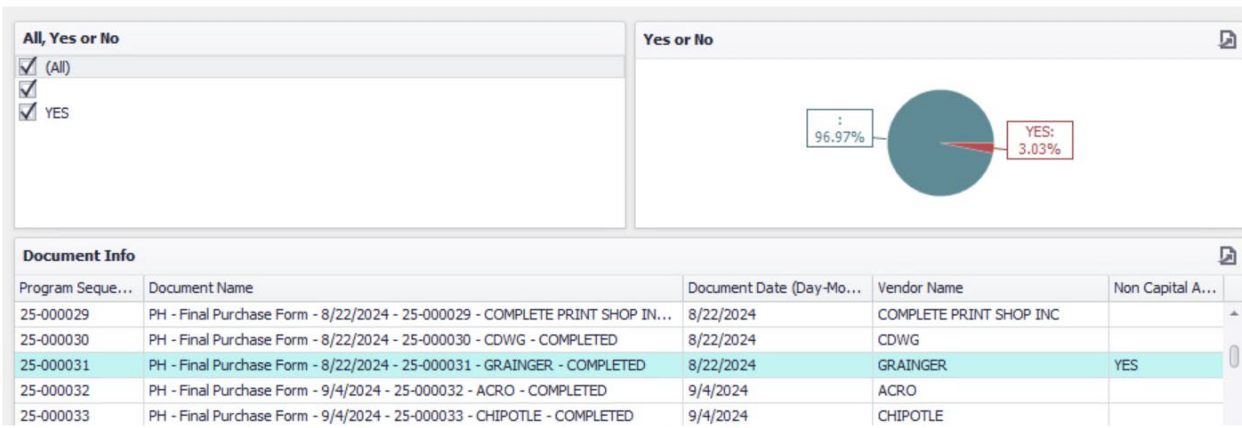
The bottom grid lists information about each Final Purchase Forms, Program Sequence, date, vendor. Users can double click on the item, and it will open the form. If users need to export the grid, they can use the small icon in the right-hand side of the grid and can export the information.

**PH – Request Form – Non Asset**

When selecting this report, users are prompted to enter a date range.




The report will gather all of the PH – Final Purchase Forms for the date range. This report can break down if the Non-Asset check box on the form was checked. A check signifies a "yes"

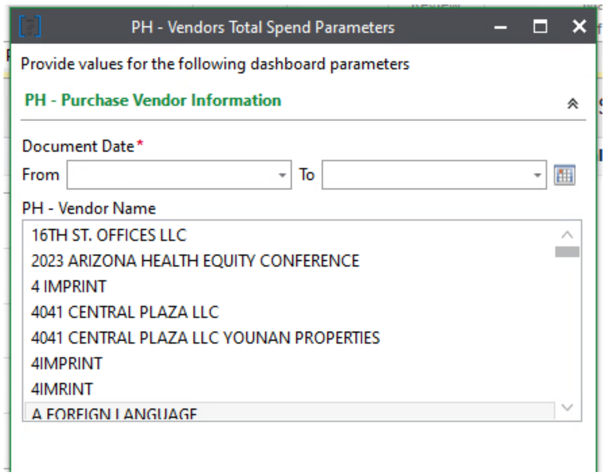


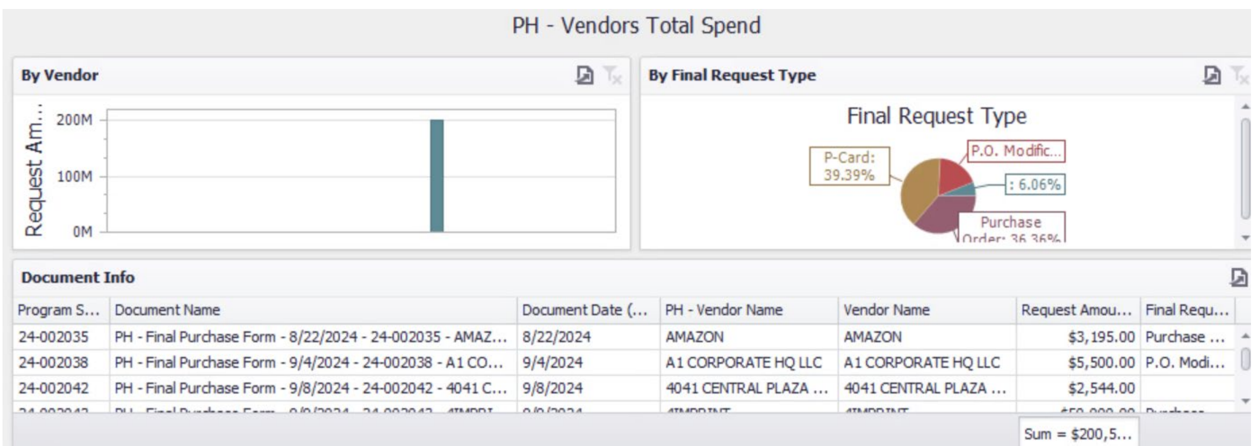

The report is broken up into three sections. The top left section allows users to filter check; all will show all the documents, yes will show the documents where the check box is selected. The other sections will change based on what is selected.

The bottom grid lists information about each Final Purchase Forms, Program Sequence, date, vendor. Users can double click on the item, and it will open the form. If users need to export the grid, they can use the small icon in the right-hand side of the grid and can export the information.

## PH – Vendors Total Spend

Users will run this report by selecting a date range.  They also have the option select a vendor if desired.

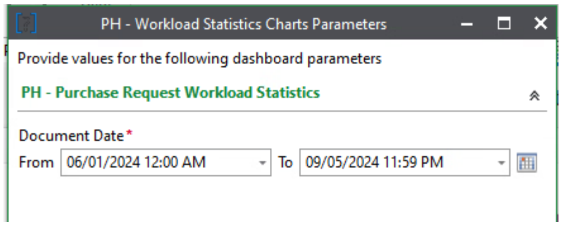


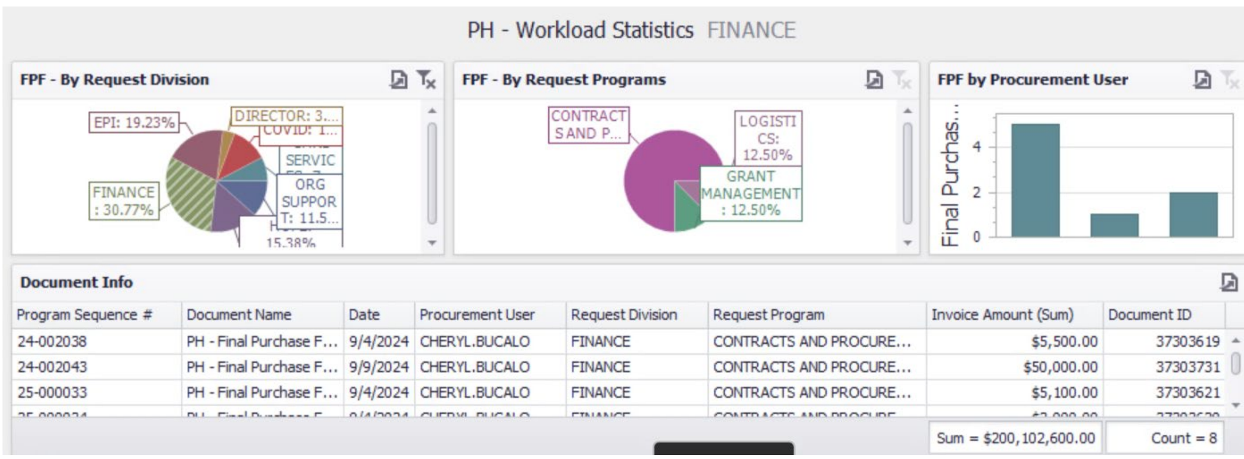




This report is in 3 sections.  The top right corner lists information by vendors.  The second section shows the breakdown by purchase type.  The grid section at the bottom, this will show Program Sequence, Document Name, Document Date, Vendor Name, Request Amount (which it totaled at the bottom) and also the Final Request Type. Users can double click on the item, and it will open the form.  If users need to export the grid, they can use the small icon in the right-hand side of the grid and can export the information.

**PH – Workload Statistics Charts**

Users will select a date range for this report.



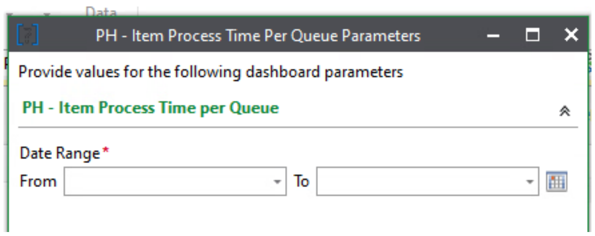



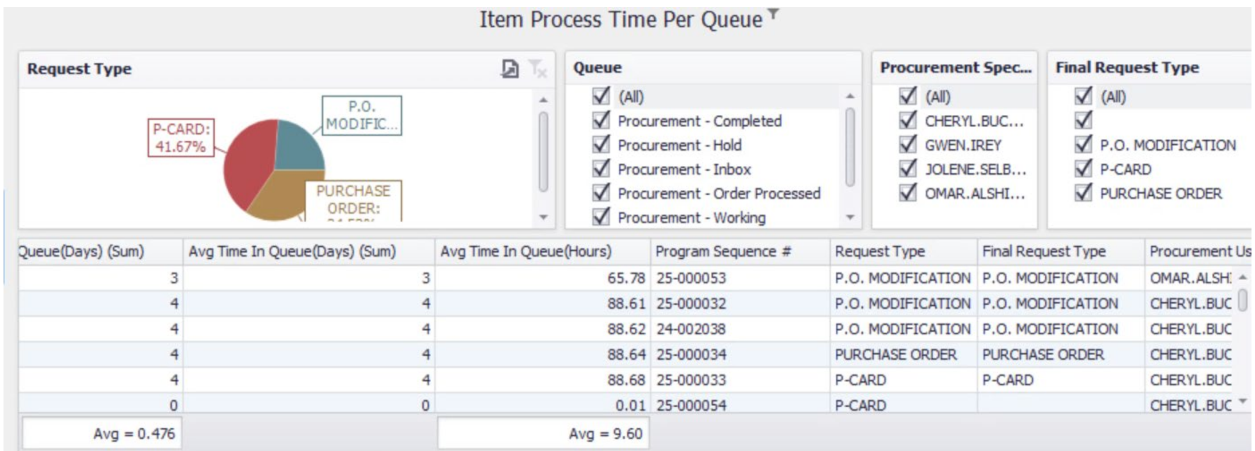

First section is the Final Purchase Form by Request Division, second section is the Final Purchase Form by Request Program, the next displays the information by Procurement User. Users can click on the division to filter the information by division if desired as well.

The grid section at the bottom will break down the information by the specific forms. The sum of the invoices is listed at the bottom. Users can double click on the item, and it will open the form. If users need to export the grid, they can use the small icon in the right-hand side of the grid and can export the information.

**PH – Item Process Time Per Queue**

This report is set up using a date range. This report will show how long forms are in the workflow.




The top left section is by the type of request. Users can filter by PO, P-Card or PO Mod and this will change the other sections of the report. Users can filter also by the workflow queue or specific workflow queues by checking the check boxes. Users can also filter by the Procurement Specialist or by request type using the next two sections. At the bottom of the grid it displays the average Max Time in queue in days and another column for hours.

The bottom grid will show how many items were processed, the min and max time in the queue, average time in queue, who the procurement specialist, the original request type, the final request type, program sequence. Users may need to scroll to view all of the available fields. Users can double click on the item, and it will open the form. For this form if users would like to export to excel, they will need to select the Export Data button on the control bar at the top.