Useful Reports in ConnectCarolina Related to Purchasing

At this step of the purchasing process...

1 Creating and submitting a purchase requisition (purchase req)

You might have these questions...

What purchase reqs have been created, but not submitted?

You can use either of these options:

- Manage Requisitions
  Set your filters to see results.
- NC_EP_REQ_STATUS query
  Once you are in the query, complete the **Unit** and **Requester** fields to see results.

2 Approving and budget checking a purchase req

What has been denied?

What reqs are waiting for approval?

You can use either of these options to answer both questions:

- Manage Requisitions
  Set your filters to see results in the **Request State** column.
- NC_EP_REQ_STATUS query
  Once you are in the query, complete the **Unit** and **Requester** fields to see results.

What failed the budget check?

You can use the NC_KK_ERRORS_REQ_DEPT query. Enter your business unit. Then in the Req ID field, enter **%**, then enter your department. Results show in the **Long Name** column.

3 Creating, budget checking, and sending a purchase order (PO).

What is my PO number?

You can use Manage Requisitions (search by the req number). Find the req number you want in your search results and click the gray arrow to the left of the req number. Then click the **Purchase Orders** icon. The PO number appears under **PO information**.

What req goes with the PO?

You can use Manage Requisitions (search by PO number). The req ID appears in the results.

What day was it sent to the supplier?

The PO Date is the date the PO was created. The date it was sent to the supplier is usually the same unless there was a budget error.

You can use either of these options:

- Purchase Order inquiry
  Search by the PO ID. See results next to **PO Date**.
- Manage Requisitions
  Set your filters to see results. Find the req number you want and click the gray arrow to the left of the req number. Then click the **Purchase Orders** icon. See results next to **PO Date**.

4 Entering invoices and receiving

What items have been received ?

PO Inquiry
Search by the PO number then click the **Document Status** link. The results show under the **Document Type** column.

Why haven't I received these items?

They could be back ordered, contact the buyer.

Did the PO get dispatched?
You can use either of these options:

- Manage Requisitions
  Set your filters to see results in the **Request State** column**.**
- PO Inquiry
  Search by the PO number. The results show next to the **PO Status**.

Have the invoices been submitted and was the receiving done?
You can use either of these options:

- Voucher Inquiry
  Search by the PO Number. Find the invoice number you want in the results. If it's not there, it either hasn't been submitted or hasn't been processed yet. If it says **Matched** in the Match Status column, then it has been received.
- PO Inquiry
  Search by the PO number then click the **Document Status** link. The results show under the Document Type Column. To see the invoice number click the **voucher number** link under the DOC ID column next to the voucher you want. Results are in the **invoice** column.

5 Creating and budget checking vouchers for invoices.

Did my Voucher get created?
You can use either of these options:

- Voucher Inquiry
  Search by PO number. If it was created, the results will show at the bottom.
- Manage Requisitions
  Set your filters to see results.
  Find the req number you want and click the gray arrow to the left of the req number. If the invoice icon is activated (in color), then it was created.

Are there any problems with my vouchers?
You can use either of these options:

- Voucher Inquiry
  Set filters to find the voucher you want. In the results section, click on the **More Details** tab to see results.
- NC_KK_ERRORS_VOUCHER_DEPT_USER
  Set your filters to see results.

Is my voucher ready for payment?

Voucher Inquiry
Set filters to find the voucher you want. In the results section, click on the **More Details** tab to see results.

6 Posting a voucher

Has my voucher posted?

You can use the Voucher Inquiry. Search by the PO number then click on the **More Details** tab. Results show under the **Post Status** Column.

7 Sending the payment

Did my invoice get paid?

You can use the Voucher Inquiry.
Set filters to find the voucher you want. Then click the **Actions** link that's in the same column as the voucher you want to see. If Scheduled Payments is an option, then it wasn't paid yet. If it has been paid, Payment Information will be an option.

When did my voucher get paid?

You can use the Voucher Inquiry.
Set filters to find the voucher you want. Then click the **Actions** link that's in the same column as the voucher you want to see. Then click **Payment Information.** Results are under the Payment Status column.

What is the Check or ACH number?

You can use the Voucher Inquiry.
Set filters to find the voucher you want. Then click the **Actions** link in the same column as the voucher you want to see. Then click **Payment Information.**
Results are under the Payment Reference ID column.

8 Closing the purchase order

Is my PO closed?
You can use either of these options:

- PO Inquiry
  Search by PO number. If the PO is closed, the PO Status will say **Compl.**
- Manage Requisitions
  Set your filters to see results in the **Request State** column.