



The Notable Procurement Reports tip sheet is for all Managers.

The following reports may be helpful for managers in locating both requisitions and purchase orders. All reports may be accessed in Workday via the Search bar by typing and selecting the name of the report.

NOTE: Access to reports is driven by security within Workday. Not all reports are visible to all employee's security roles.

Find Purchase Order

Follow the steps below to access and view one of the following reports.

1. In the Workday Search bar, type **“Find Purchase Order”** and press **Enter**. Purchase Order Reports display.
2. Select from the following reports.
 - **Find Purchase Order Lines and Line Splits-CR1086 – CHESS Report**
Security Role = Business Office
The report displays the commodity purchase history including a Description, Unit of Measure, the Amount Ordered and Accepted, the Unit Price, Quantity of Approved Amounts, and the Extended Price. Company is a required prompt. Optional Prompts: Supplier, Buyer, Purchase Order, Purchase Order Status, Worktags, Document Date range, Exclude Canceled, Exclude Closed.
 - **Find Purchase Order Lines and Line Splits-CR1140 – CHESS Report**
Security Role = All Cost Centers Managers
This report lists purchase orders with packing slips for purchase orders that have never been invoiced at the line level detail. Optional Prompts: Purchase Order, Purchase Order Status, Supplier.
 - **Find Purchase Order Lines for Organizations Report (1140 is the custom reporting for this report)**
 - **Find Purchase Order with Detail – CR0529 - CHESS Report**
Security Role = Business Office
Accesses the Purchase Order as the primary business object and provides all the details about specific purchase orders in one report. This report serves to summarize all information regarding purchase orders in one place.

- **Find Purchase Orders**

- **Security Role = Business Office and Procurement Analysts**

- View Purchase Order information for all selected Purchase Orders. Details include version, company, PO status, memo, supplier, PO date, due date, amount, currency, supplier contract, and a list of receipts and invoices for each purchase order. You can drill into the receipts and invoices for more information. No Required prompts. Optional prompts: Company, Supplier, Purchase Order, Purchase Order Date, Due Date, Contract, Requisition, Requester, Invoice, Created by Worker, Approving Worker, Worktags.

3. Workday displays a window with fields for each report.
4. Complete the required fields and any optional fields by which you want to filter.
5. Select **OK**. Workday displays the report and may include data such as the Requisition Line, Requisition, Company, Item, Item description, Spend Category as Worktag, Extended Amount, Supplier, Status, Requester, Requisition Date, Worktags, The Requisition Sourcing Buyer, and Line Splits.

Find Supplier Invoices

Follow the steps below to access and view one of the following reports.

1. In the Workday Search bar, type “**Find Supplier Invoice**” and press **Enter**. The Supplier Invoices Reports display.
2. Select from the following reports.

- **Find Supplier Invoices**

- **Find Supplier Invoices – CR1142 – CHESS**

- **Security Role = Business Office**

- **Find Supplier Invoices – CR1143 – CHESS**

- **Security Role = Cost Center Managers, Cost Center Analyst, Project Managers**

- **Find in Progress Supplier Invoices with Accounting Date Overrides**

- **Security Role = Business Office**

- This advanced report enables billing specialists to view the supplier invoices with accounting date overrides in a given time period that you specify. The report uses the Supplier Invoices report data source. Required prompts: Company, Accounting Date.

Find Suppliers

Security Role = All Employees

1. In the Workday Search bar, type “**Find Suppliers**” and press **Enter**. The Supplier Reports display.

2. Select from the following reports.
 - **Find Suppliers**
 - **Find Suppliers – For Conversion Review**
3. Workday displays a window with fields for each report.
4. Complete the required fields and any optional fields by which you want to filter.
5. Select **OK**. Workday displays the report.