Purchase Query

The Purchase Query allows the user to list all purchasing documents (Reservations, Requests, Orders, Invoices and Receipts) based on the following user-specified query criteria: Open/Closed, Accounting Period, Closed Dates, Document Dates, Document Category, Document Type, Outstanding/Closed Amounts, Document Range, User ID, Vendor, and Accounting Strip information. The query can also allow the user to view the document and its references. The Purchase Query is accessed from Queries => Purchasing => Purchase Query.

Search Suggestions

The following suggestions have been created to assist users in running the Purchase Query to return a reasonable number of records. Due to the large quantity of documents in Pegasys, the Purchase Query needs to have certain parameters completed in order to reduce the amount of records returned. Click the Accounting Dimensions Link to see accounting information.

The following parameter fields are Required when running the Purchase Query:

>
> Query Type
> Which Documents
> Document Date To*
> Document Date From*

> **Accounting Strip:**

>
> BBFY
> Fund

* The range between the Document Date To and From fields should be no more than 31 days.

Depending on the size of the Fund, more detailed information may be needed, along with the Required fields listed above, to further restrict the number of records being returned. This detailed information may include the Accounting Template, other accounting strip information, vendor information, closed amount, and any other fields available on the Purchase Query.

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Workload	

Assigned Date From: _____ To: _____

Expected Completion Date From: _____ To: _____

Priority: _____

Automated Match Status Query
Blanket Agreement Query
Completed Match Review Query
Contract Query
Purchase Query

ormation   Display 10 Items

	Name	Task	Expected Completion	Priority	Assigned	Description	Task Status
			- NO ITEMS TO DISPLAY -				

Name: _____   Created: _____
Task Status: _____   Last Updated: _____
Process State: _____ Acquired: _____

Done   Local intranet

Second screenshot:

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Transactions Queries Reference System Administration Utilities

Pegasys > Queries > Purchasing > Purchase Query

Purchase Query

Search Criteria

Query Type: _____
Which Documents: _____
Document Category: _____
Document Type: _____

Document Number
From: _____
To: _____

Search Clear

Accounting Period
From: _____
To: _____

Closed Date
From: _____
To: _____

Document Date
From: _____
To: _____

Outstanding Amount: _____ Value: _____
Closed Amount: _____ Value: _____

User ID: _____

Vendor
Vendor Code: _____ _____
Name: _____

Accounting Dimensions

Template: _____

BBFY: _____   EBFY: _____   Fund: _____   Region: _____   Org Code: _____

Budget Activity: _____   Project Code: _____   Function: _____   Cost Element: _____   Revenue Source: _____

Sub Revenue Source: _____   Building #: _____   System: _____   Vehicle Tag #: _____   Work Item: _____

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