

# RUNNING REPORTS

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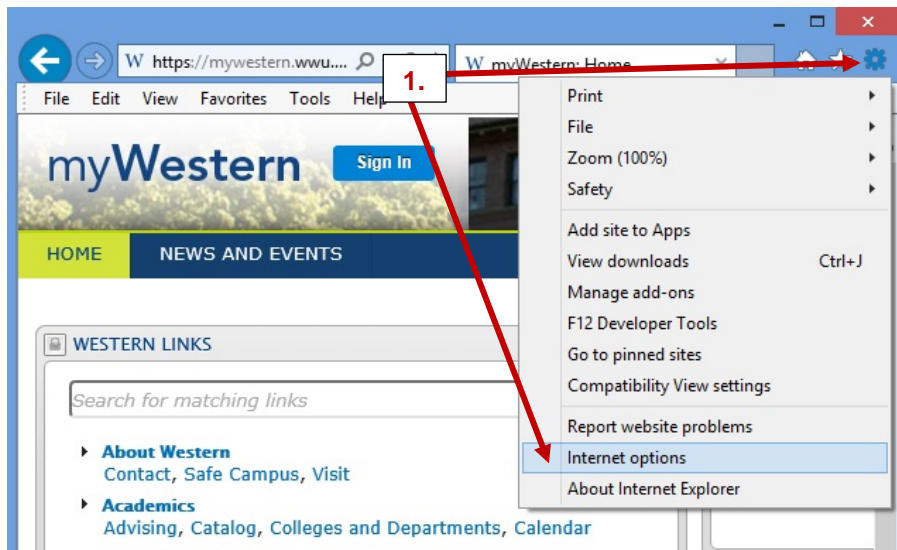
## Reports

### Internet Explorer (IE) Setup for Running Reports

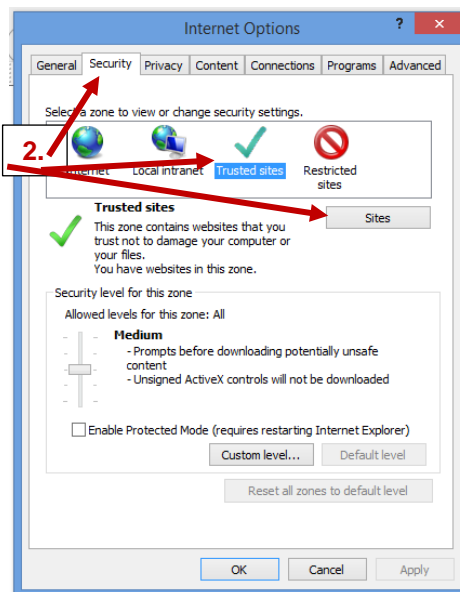
To run reports from Western Marketplace in IE, two websites have to be added to the trusted sites in the browser.

**\*Note these steps are not needed in Chrome, Firefox or Safari.**

1. Open Internet Explorer, click the gear in the top right corner of the browser select Internet Options.

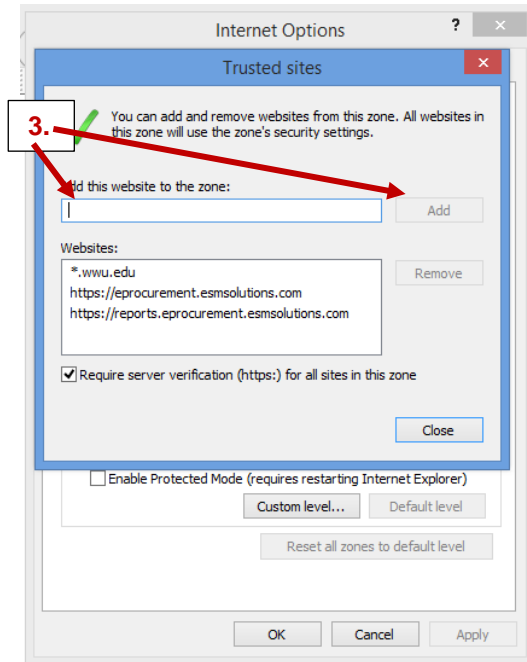


2. In the Internet Options pop up box, click the Security tab, select Trusted sites and click the Sites button.



3. Add the following web pages in the space provided below 'Add this website to the zone':

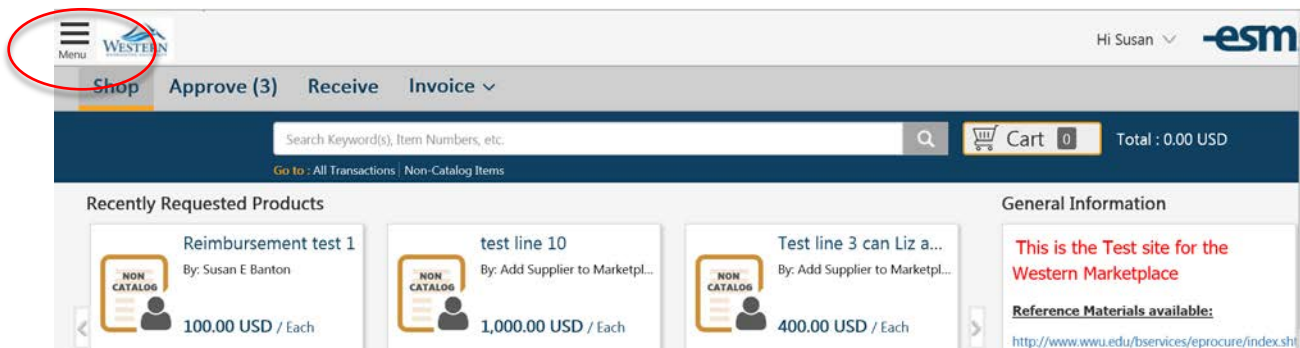
<https://eprocurement.esmsolutions.com>  
<https://reports.eprocurement.esmsolutions.com>



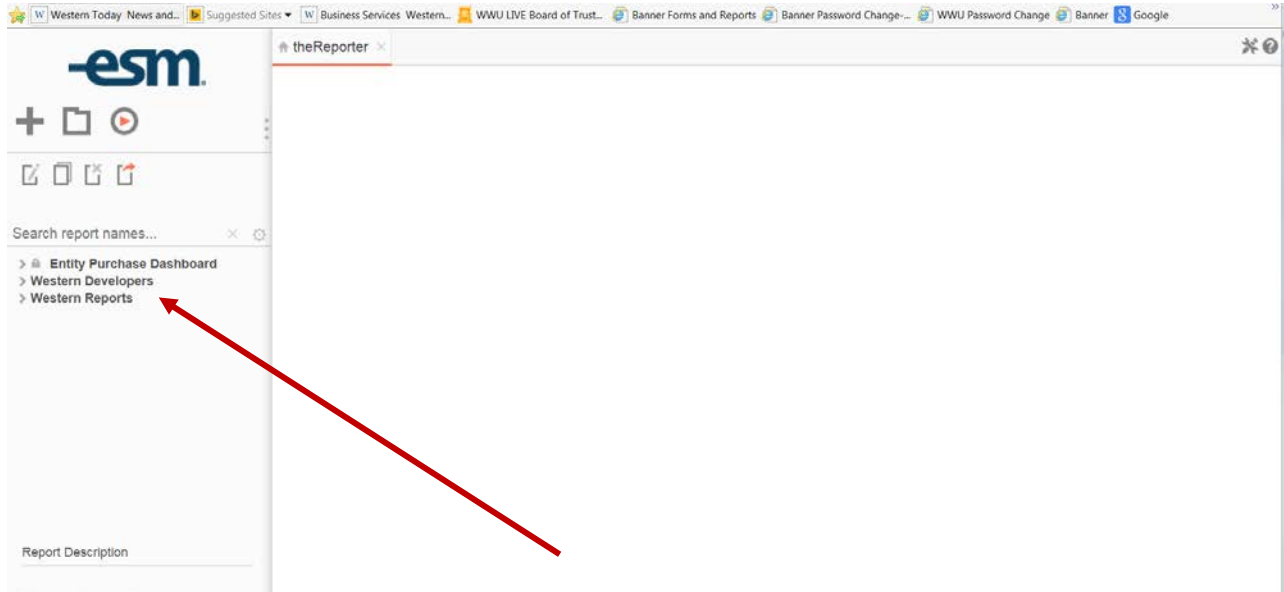
Add the websites one URL at a time, click add, when finished click close (Trusted sites box), click apply, click ok, and click 'x' to close Internet Options box.

## Running a Report in Western Marketplace

In the Marketplace from the menu drop down select "reporting" (if you don't see "reporting" in the drop down list, please contact the System Administrator at 650-2430 or send an email to ESM.Support@wwu.edu):



A new window opens in your browser:

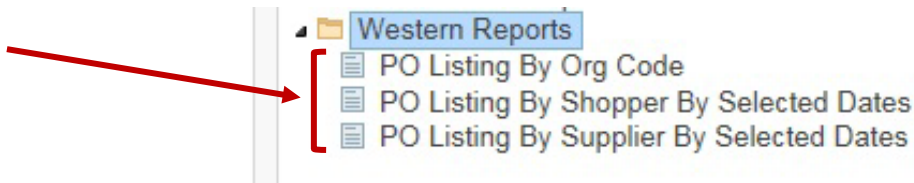


Campus User Marketplace reports are located in the **Western Reports** folder on the left side navigation:

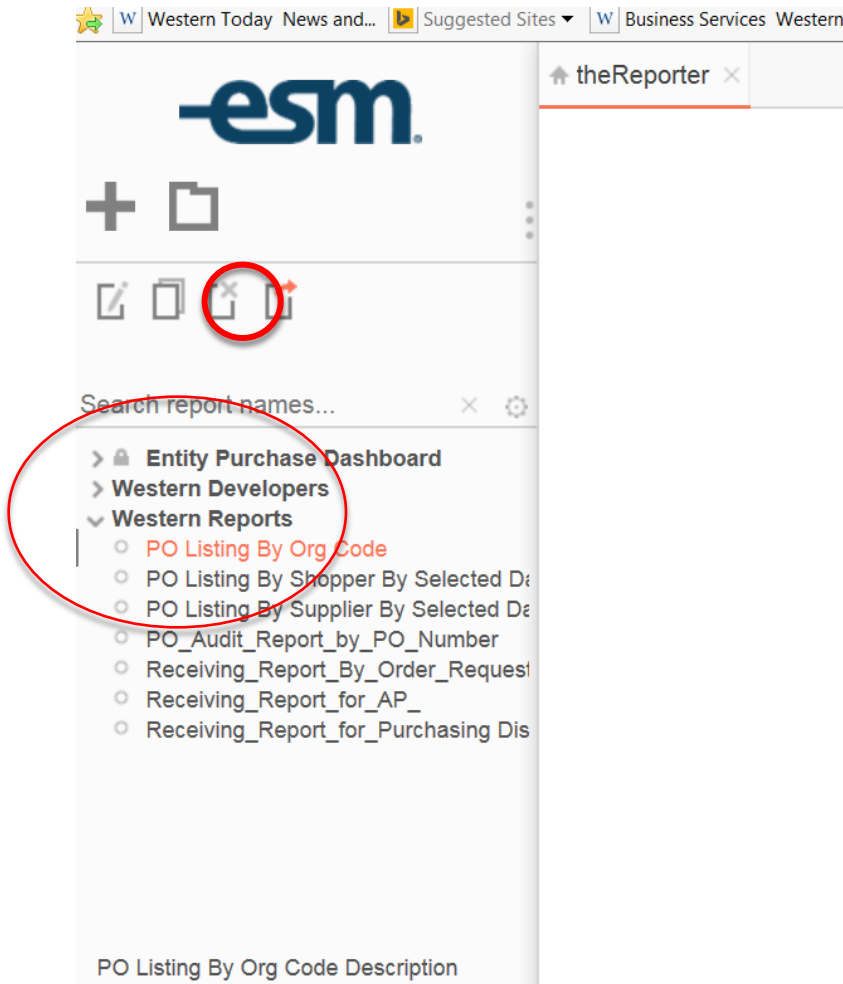
**1. Click arrow to open Western Reports folder.**

List of reports display below

**2. Select report from drop down list**

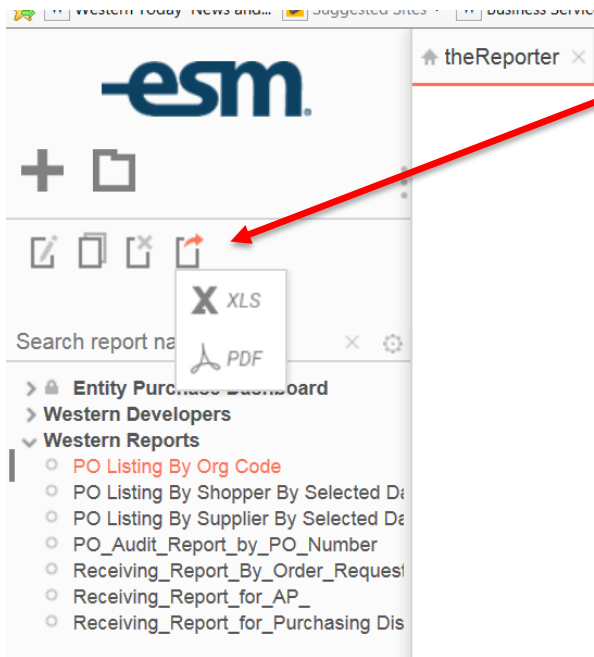


On the left hand navigation, click the arrow next to Western Reports. Select report you would like to run from the drop down list. Once report is selected the report name will be highlighted in orange.

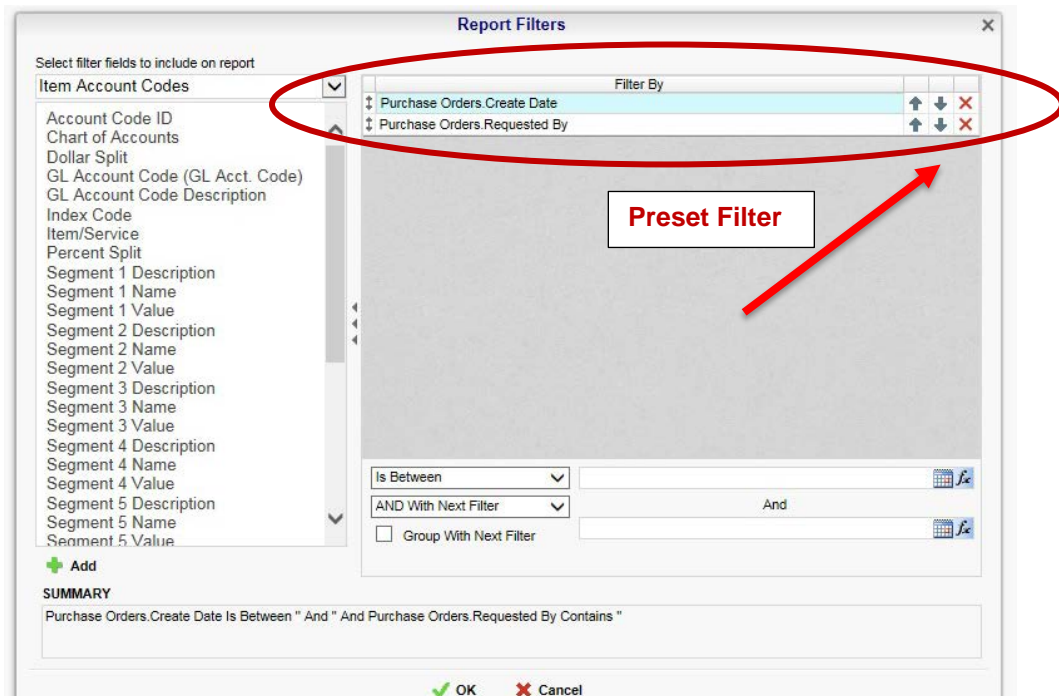


You will then select the “Export Report” Icon. This looks like a piece of paper with an arrow. You may also Right click the selected report to select how you wish to export your report. Your choices will normally be to have the report exported in excel format (XLS) or in PDF format after you have entered the information needed in the preset filters, but reports are also available in RTF and csv formats.

Export Icon



A Report Filters box opens on the right. Each report type comes with preset filters (on the right side of the Report Filters window highlighted in aqua below). Filters are used to query the data. The preset filters change from report to report.



When you select a preset filter in the 'Filter By' section, you must complete the section below.

**Purchase Orders. Create Date is selected above (highlighted). You must enter data below. For this query enter a range of dates.**

Is Between 08/03/2015 08/10/2015

AND With Next Filter And

Group With Next Filter

**+** Add

**SUMMARY**  
Purchase Orders.Create Date Is Between '08/03/2015' And '08/10/2015' And Purchase Orders.Supplier Contains ''

OK Cancel

Notice in the SUMMARY section will indicate what filters you have selected. Each filter in the list must include query data. For example, in this report you will need PO create Date and Suppliers. Click the next filter 'Purchase Orders. Supplier' and enter criteria.

**Purchase Orders by Supplier is selected above (highlighted). You must enter data below. For this query enter in part of the supplier name.**

Contains depot

AND With Next Filter

Group With Next Filter

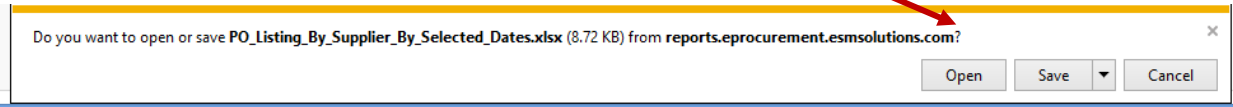
**+** Add

**SUMMARY**  
Purchase Orders.Create Date Is Between '08/03/2015' And '08/10/2015' And Purchase Orders.Supplier Contains 'depot'

OK Cancel

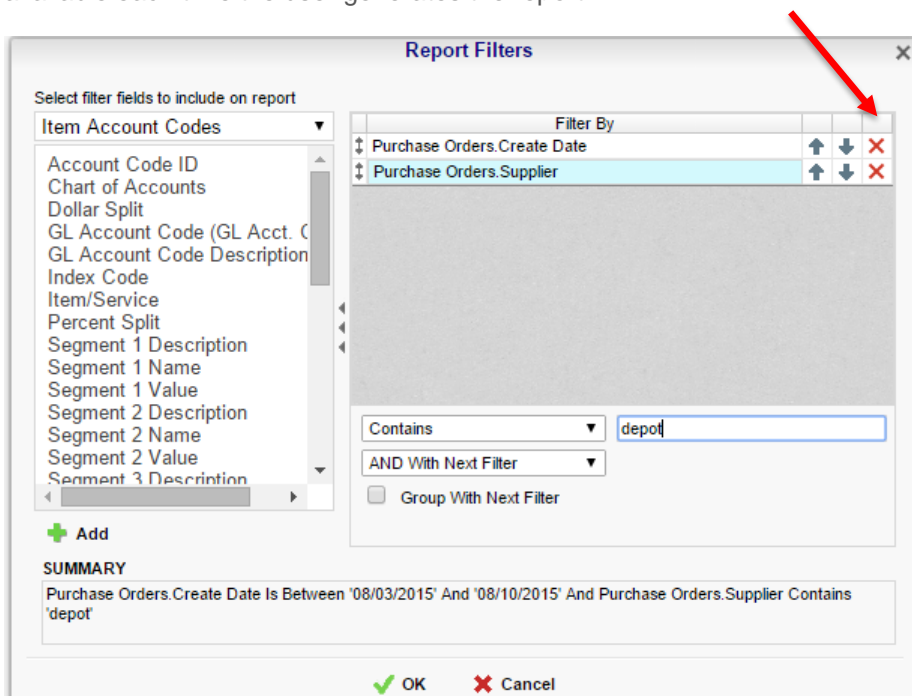
**Click OK after all search criteria is entered.**

The SUMMARY section now includes all the search criteria for the preset filters for this report and we are ready to run the report. Click 'OK'. It will take a few seconds for the report to generate. When prompted click open. The report opens in an excel spreadsheet.



Each 'run' of the report is one time only. The user controls the report cycle from creation to delivery and use of report(s). The excel spreadsheet generated can be saved and edited.

**Note:** You can remove filters. To remove a filter click the delete button (X) to the right of the filter. Removing the filter only happens in this instance of running the report. The default preset filters are available each time the user generates the report.



## Available Reports

- 1. PO Listing By Org Code**  
Run a report using an org code, search can include date range.
- 2. PO Listing By Shopper By Selected Dates**  
Run a report by a shopper name, search can include date range.
- 3. PO Listing By Supplier By Selected Dates**  
Run a report by supplier name, search can include date range
- 4. PO Audit Report by PO Number**  
Enter a PO number and overall of the PO actions is available in PDF.
- 5. Receiving Report by Order Requestor**



Run a report by a shopper name can include date range.

**6. Receiving report for AP**

Provides a report of all Campus Purchase Orders by a define date period, anyone may request.

**7. Receiving Report for Purchasing Distribution to Purchasers**

Provides a report of all Campus Purchase by defined dates. Shows receiving status.

Need additional reports? Send requests to [ESM.Support@wwu.edu](mailto:ESM.Support@wwu.edu) outlining report parameters and/or requirements.