

**PO Summary by Business Unit**  
**Created on 3/18/2010 3:45:00 PM**

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The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

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## **PO Summary by Business Unit**

### **PO Summary by Business Unit Overview**

The PO Summary by Business Unit report prints purchase order information for a specified dollar range during a specified time frame for a business unit. You can review individual amounts for each purchase order, including the ordered amount, received amount and open amount. You can also review the total amount for all purchase orders for the business unit.

The report includes order number, order type, request date, scheduled pick (promised delivery), ordered amount, received amount, and open amount (with a total for each Business Unit.) The report is sorted by Business Unit (called Branch/Plant) with a grand total at the bottom.

This report identifies direct purchases between \$2000 and \$10,000.

### **PO Summary by Business Unit Lesson**

#### **Procedure**

In this lesson you will learn how to run the PO Summary by Business Unit Report.

Navigation: There are multiple menu paths for this report. This lesson uses the Purchasing menu path.

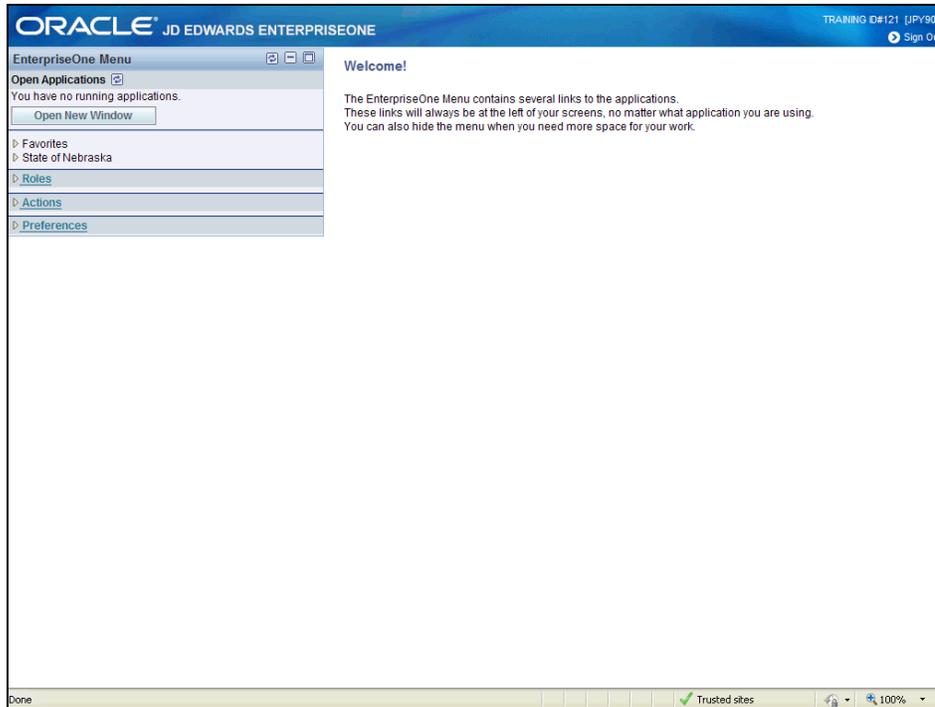
State of Nebraska > Purchasing - Agencies > Inquiries & Reports > Purchasing Reports > Procurement Reports > PO Summary by Business Unit

or

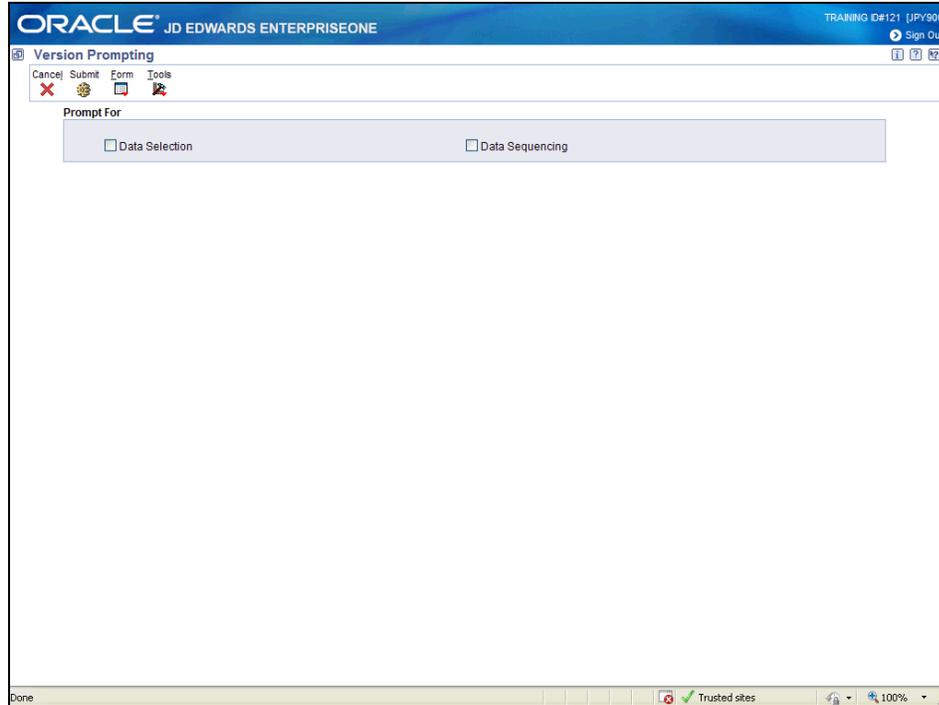
State of Nebraska > Inventory > Inquiries & Reports > Purchasing Reports > Procurement Reports > PO Summary by Business Unit

# Training Guide

## PO Summary by Business Unit



Step	Action
1.	Click the <b>State of Nebraska</b> link. <a href="#">State of Nebraska</a>
2.	Click the <b>Purchasing - Agencies</b> link. <a href="#">Purchasing - Agencies</a>
3.	Click the <b>Inquiries &amp; Reports</b> link. <a href="#">Inquiries &amp; Reports</a>
4.	Click the <b>Purchasing Reports</b> link. <a href="#">Purchasing Reports</a>
5.	Click the <b>Procurement Reports</b> link. <a href="#">Procurement Reports</a>
6.	Click the <b>PO Summary by Business Unit</b> link. <a href="#">PO Summary by Business Unit</a>



Step	Action
7.	Click the <b>Data Selection</b> option. 
8.	Click the <b>Submit</b> button. 
9.	<p>Leave the first row (Order Type) as is. Report is setup to run on all Commodity Purchase Orders and all Direct Purchase Authority Orders.</p> <p><b>Note:</b> Agencies with stock supply Inventory must add ZP to the first row (on the List of Values Tab after clicking Literal).</p> <p><b>Note:</b> To change the information in the Right Operand field, click the drop-down arrow in the corresponding row and choose Literal. Enter the appropriate information, and click OK to return to the Data Selection window.</p>

# Training Guide

## PO Summary by Business Unit



ORACLE JD EDWARDS ENTERPRISEONE TRAINING ID#121 [JPY900] Sign Out

Data Selection

OK Cancel Delete Up Down

Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/>	Where Order Type (F4311) (DCTO) [BC]	is equal to	"OP,ZO"
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is greater than or equal to	Null Date
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is less than or equal to	Null Date
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is less than	"10,000.00"
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is greater than or equal to	"2,000.00"
<input type="checkbox"/>	And		

[Add Row](#)

[Advanced](#)

Done Trusted sites 100%

Step	Action
10.	Click the <b>Right Operand</b> list of the second row. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Null Date</div>

ORACLE JD EDWARDS ENTERPRISEONE TRAINING ID#121 [JPY900] Sign Out

Data Selection

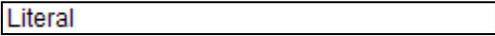
OK Cancel Delete Up Down

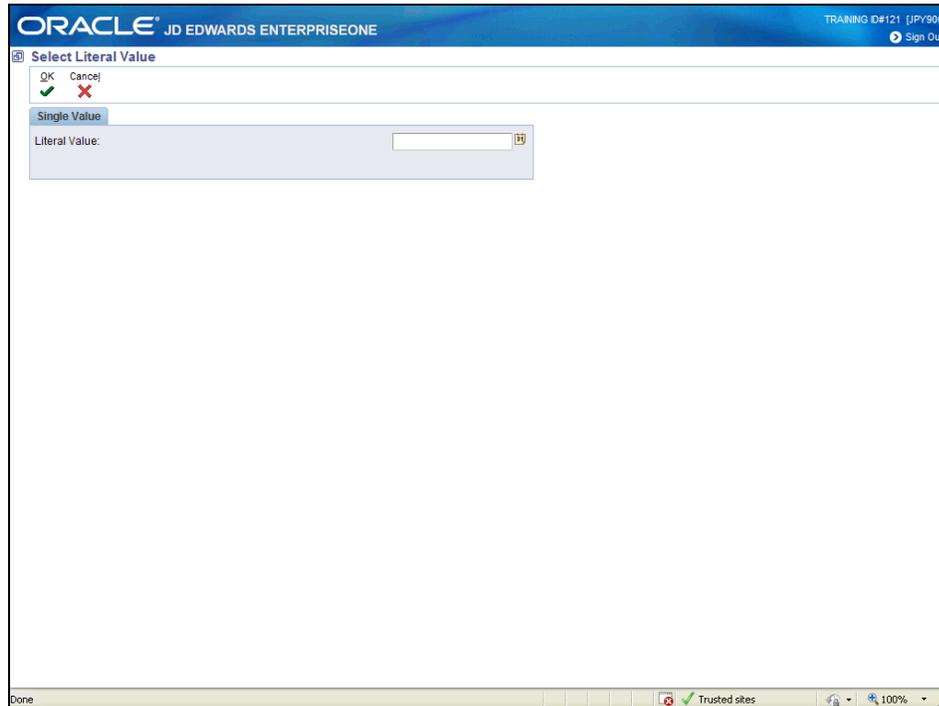
Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/>	Where Order Type (F4311) (DCTO) [BC]	is equal to	"OP,ZO"
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is greater than or equal to	Null Date
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is less than or equal to	Null Date
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is less than	Date - Requested (F4311) (DRQJ) [BC] Date - Scheduled Pick (F4311) (PDDJ) [BC] DateToday [SL] Promised Date Global [RV] Requested Date Global [RV]
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is greater than or equal to	
<input type="checkbox"/>	And		

[Add Row](#)

[Advanced](#)

Done Trusted sites 100%

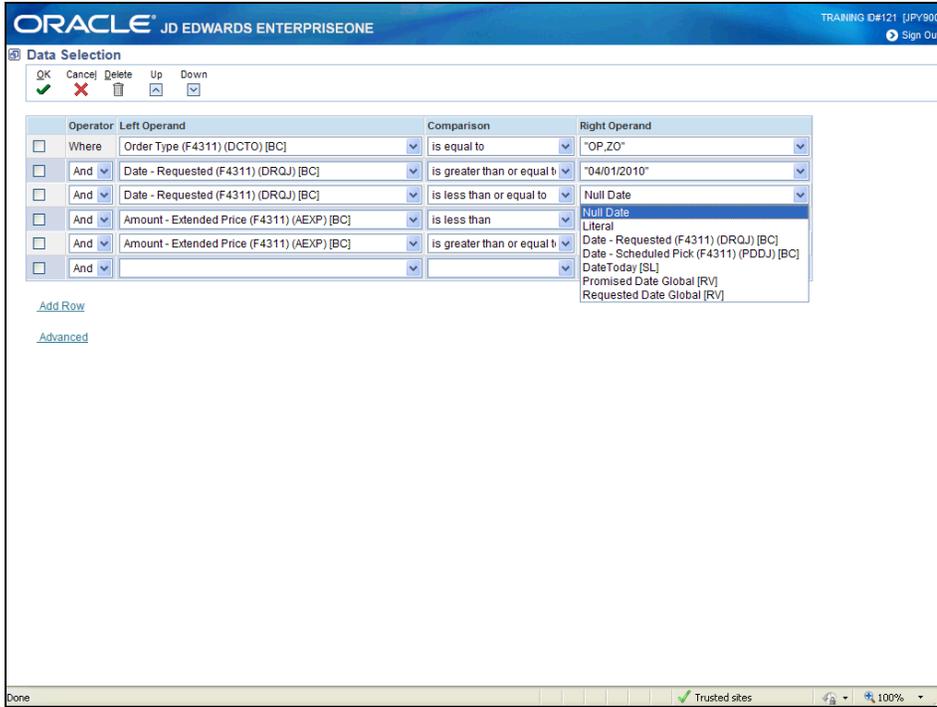
Step	Action
11.	Click the <b>Literal</b> list item. 



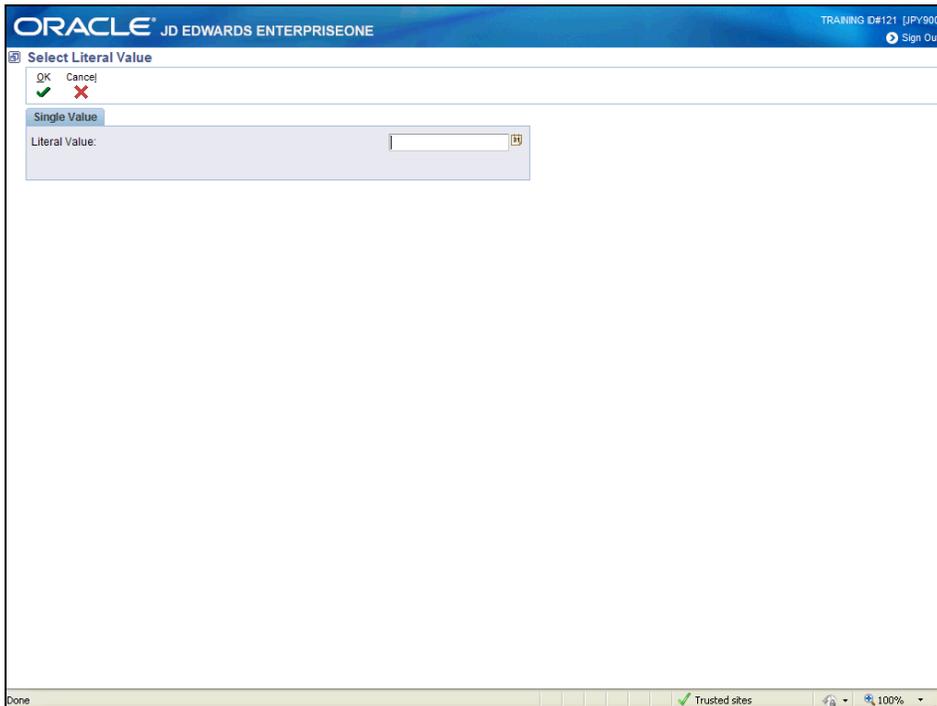
Step	Action
12.	Enter the beginning date of the date range for which to run the report into the <b>Literal Value:</b> field.
13.	Click the <b>OK</b> button. 
14.	Click the <b>Right Operand</b> list third row. 

# Training Guide

## PO Summary by Business Unit



Step	Action
15.	Click the <b>Literal</b> list item. <input type="text" value="Literal"/>



Step	Action
16.	Enter the end date of the date range for which to run the report into the <b>Literal Value:</b> field.
17.	Click the <b>OK</b> button. 
18.	Click the <b>Left Operand</b> list of the first blank row.

The screenshot shows the 'Data Selection' dialog box in Oracle JD Edwards EnterpriseOne. The dialog has a title bar with 'ORACLE JD EDWARDS ENTERPRISEONE' and 'TRAINING D#121 [JPY900]'. Below the title bar are buttons for 'OK', 'Cancel', 'Delete', 'Up', and 'Down'. The main area contains a table with the following columns: 'Operator', 'Left Operand', 'Comparison', and 'Right Operand'. The first row is selected, and a list of available operands is displayed below the table. The list includes 'Business Unit (F4311) (MCU) [BC]'.

Operator	Left Operand	Comparison	Right Operand	
<input type="checkbox"/>	Where	Order Type (F4311) (DCTO) [BC]	is equal to	"OP,ZO"
<input type="checkbox"/>	And	Date - Requested (F4311) (DRQJ) [BC]	is greater than or equal to	"04/01/2010"
<input type="checkbox"/>	And	Date - Requested (F4311) (DRQJ) [BC]	is less than or equal to	"04/16/2010"
<input type="checkbox"/>	And	Amount - Extended Price (F4311) (AEXP) [BC]	is less than	"10,000.00"
<input type="checkbox"/>	And	Amount - Extended Price (F4311) (AEXP) [BC]	is greater than or equal to	"2,000.00"
<input type="checkbox"/>	And			

Available operands list:

- Address Number (F4311) (AN8) [BC]
- Amount - Extended Price (F4311) (AEXP) [BC]
- Amount - Foreign Changed Amount (F4311) (FCHG) [BC]
- Amount - Foreign Extended Price (F4311) (FEA) [BC]
- Amount - Foreign Open (F4311) (FAP) [BC]
- Amount - On Hold (F4311) (ACHG) [BC]
- Amount - Open (F4311) (AOPN) [BC]
- Amount - Received (F4311) (AREC) [BC]
- Amount - Received Foreign (F4311) (FRECE) [BC]
- Business Unit (F4311) (MCU) [BC]
- Currency Code - From (F4311) (CRCD) [BC]
- Date - Requested (F4311) (DRQJ) [BC]
- Date - Scheduled Pick (F4311) (PDDJ) [BC]
- Description (F4311) (DSC1) [BC]
- Description - Line 2 (F4311) (DSC2) [BC]
- Document (Order No, Invoice, etc.) (F4311) (DOCO) [BC]
- Line Number (F4311) (LNID) [BC]
- Order Fund (Order Number) (F4311) (KCOO) [BC]
- Order Suffix (F4311) (SF XO) [BC]
- Order Type (F4311) (DCTO) [BC]

Step	Action
19.	Click the <b>Business Unit (F4311) (MCU) [BC]</b> list item.

# Training Guide

## PO Summary by Business Unit



ORACLE JD EDWARDS ENTERPRISEONE TRAINING ID#121 [JPY900] Sign Out

Data Selection

OK Cancel Delete Up Down

Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/>	Where Order Type (F4311) (DCTO) [BC]	is equal to	*OP,ZO*
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is greater than or equal to	*04/01/2010*
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is less than or equal to	*04/16/2010*
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is less than	*10,000.00*
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is greater than or equal to	*2,000.00*
<input type="checkbox"/>	And Business Unit (F4311) (MCU) [BC]		

[Add Row](#)  
[Advanced](#)

Done Trusted sites 100%

Step	Action
20.	Click the <b>Comparison</b> list. <div style="border: 1px solid black; width: 100px; height: 20px; margin: 5px 0;"></div>

ORACLE JD EDWARDS ENTERPRISEONE TRAINING ID#121 [JPY900] Sign Out

Data Selection

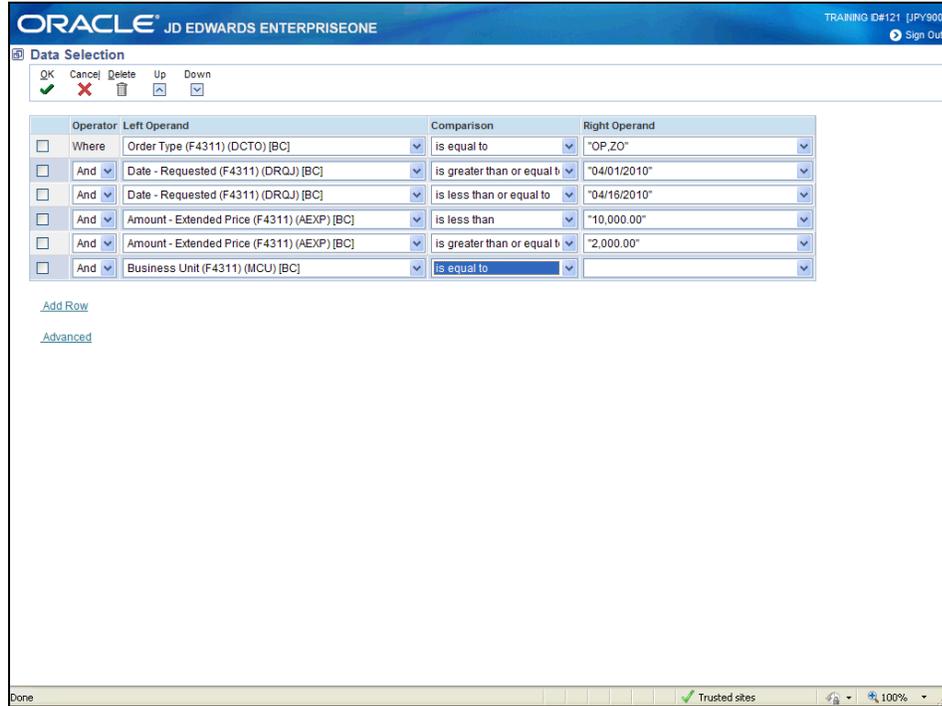
OK Cancel Delete Up Down

Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/>	Where Order Type (F4311) (DCTO) [BC]	is equal to	*OP,ZO*
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is greater than or equal to	*04/01/2010*
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is less than or equal to	*04/16/2010*
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is less than	*10,000.00*
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is greater than or equal to	*2,000.00*
<input type="checkbox"/>	And Business Unit (F4311) (MCU) [BC]	<div style="border: 1px solid black; padding: 2px;">                     is equal to                      is not equal to                      is less than                      is less than or equal to                      is greater than                      is greater than or equal to                 </div>	

[Add Row](#)  
[Advanced](#)

Done Trusted sites 100%

Step	Action
21.	Click the <b>is equal to</b> list item. <div style="border: 1px dashed black; padding: 2px; display: inline-block;">is equal to</div>



Step	Action
22.	Click the <b>Right Operand</b> list. <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <input type="text"/> </div>

# Training Guide

## PO Summary by Business Unit



ORACLE JD EDWARDS ENTERPRISEONE TRAINING ID#121 [JPY900] Sign Out

Data Selection

OK Cancel Delete Up Down

Operator	Left Operand	Comparison	Right Operand
<input type="checkbox"/>	Where Order Type (F4311) (DCTO) [BC]	is equal to	"*OP,ZO"
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is greater than or equal to	"04/01/2010"
<input type="checkbox"/>	And Date - Requested (F4311) (DRQJ) [BC]	is less than or equal to	"04/16/2010"
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is less than	"10,000.00"
<input type="checkbox"/>	And Amount - Extended Price (F4311) (AEXP) [BC]	is greater than or equal to	"2,000.00"
<input type="checkbox"/>	And Business Unit (F4311) (MCU) [BC]	is equal to	

Add Row  
Advanced

- Blank
- Zero
- Null
- Literal
- Business Unit (F4311) (MCU) [BC]
- Currency Code - From (F4311) (CRCD) [BC]
- Currency Code Global [RV]
- Description (F4311) (DSC1) [BC]
- Description - Line 2 (F4311) (DSC2) [BC]
- Description 2 Global [RV]
- Description Global [RV]
- Name - Alpha [RV]
- Order Fund (Order Number) (F4311) (KCOO)
- Order Suffix (F4311) (SFXO) [BC]
- Order Type (F4311) (DCTO) [BC]
- Order Type Global [RV]

Done Trusted sites 100%

Step	Action
23.	Click the <b>Literal</b> list item. <input type="text" value="Literal"/>

ORACLE JD EDWARDS ENTERPRISEONE TRAINING ID#121 [JPY900] Sign Out

Select Literal Value

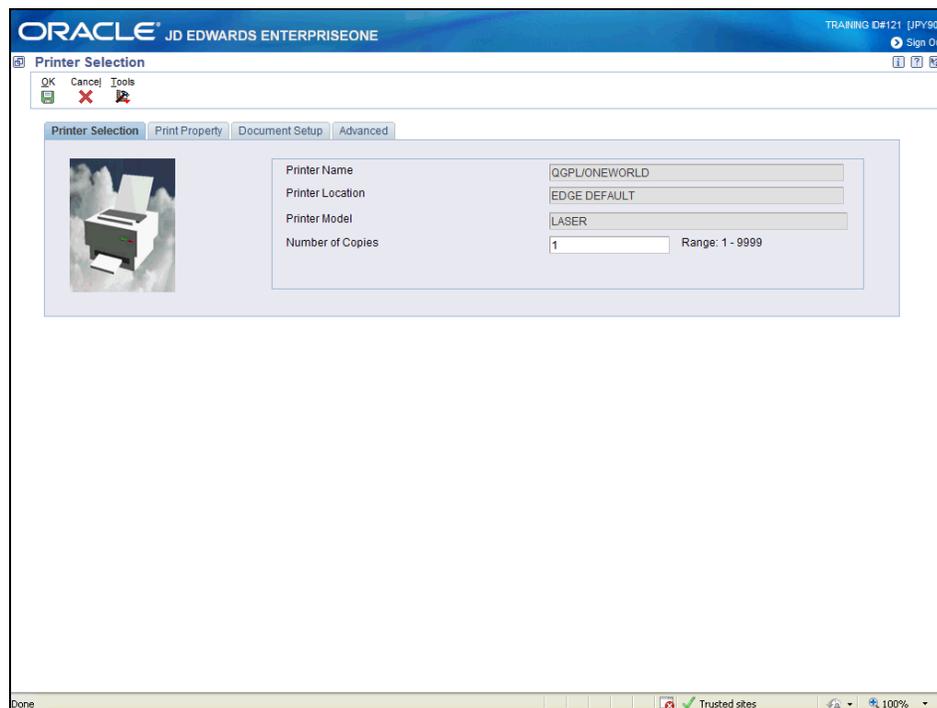
OK Cancel

Single Value Range of Values List of Values

Literal Value:

Done Trusted sites 100%

Step	Action
24.	Enter the business unit (branch/plant) for which to run report into the <b>Literal Value:</b> field.
25.	Click the <b>OK</b> button. 
26.	To run report for a specific vendor, complete the following information in the next blank line:  <b>Left Operand</b> – Address Number (F4311) (AN8) [BC] This field pulls from the order detail lines. <b>Comparison</b> – is equal to <b>Right Operand</b> – enter the supplier's address book number
27.	Click the <b>OK</b> button. 



Step	Action
28.	Click the <b>OK</b> button. 

# Training Guide

## PO Summary by Business Unit



Step	Action
29.	<p>To view the report you will need to go to View Job Status. For more information go to the Reports Lesson under the System Basics (<a href="http://www.das.state.ne.us/nis/training_manuals/sys_bscs/index.html">http://www.das.state.ne.us/nis/training_manuals/sys_bscs/index.html</a>) Training Guides.</p> <p>You have successfully completed this lesson.</p> <p><b>End of Procedure.</b></p>