PO Recap (R5743542)

Overview

This report shows the number of purchase orders for an agency and the total dollar amount for a specific date range. This report includes agency number, agency name, number of purchases and order gross amount. This report does not list detail information, as it is a basic, high-level overview.

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. 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 Administrative Services website: http://www.das.state.ne.us/.

Navigation

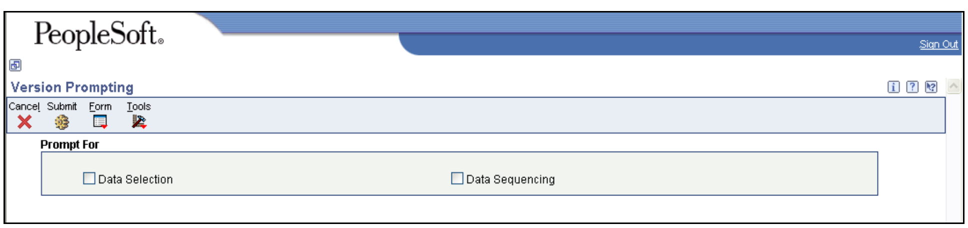
Click Roles, Procurement or Inventory.
(Citrix users – right click on the menu, choose Apply Roles, choose Procurement.)

Inquiries & Reports > Purchasing Reports > Procurement Reports > PO Recap

Steps

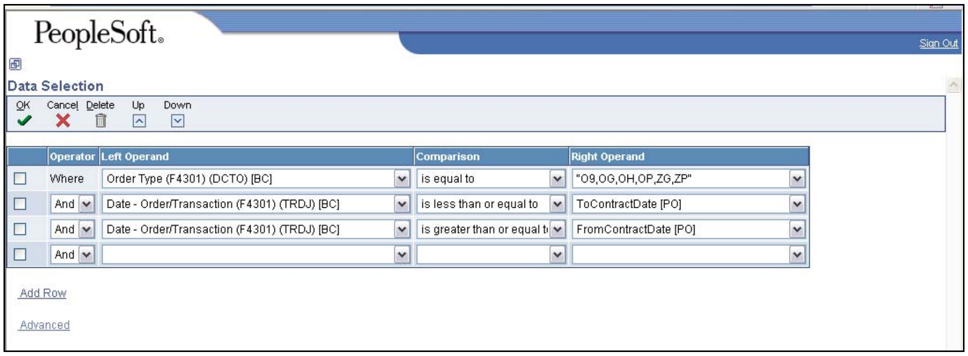
Run the PO Recap Report

Start this instruction from the Version Prompting window.



1. Choose Data Selection.

2. Click **Submit**. The Data Selection window appears.



3. Leave the first row (Order Type) as is to run report on all Purchase Order types, or change the Right Operand to the specific Order Type(s) for which to run the report

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.

4. Leave the second and third rows (Dates) as is; the dates will be entered on the Processing Options window.

5. To run the report for a specific agency, enter the following information on the next blank line:

   - Left Operand: "Agency Number (F0006) (RP01) [BC]"

     This field pulls from the Business Unit Master table which is tied to the business unit on the order header.

   - Comparison: "is equal to"
   - Right Operand: "literal." Enter 3-digit agency number

6. To run the report for a specific Vendor, enter the following information on the next blank line:

   - Left Operand: "Address Number (F4301) (AN8) [BC]"

     This field pulls from the order header.

   - Comparison: "is equal to"
   - Right Operand: "literal." Enter Supplier's address book number

7. To run the report for a specific Buyer, enter the following information on the next blank line:

   - Left Operand: "Buyer Number (F4301) (ANBY) [BC]"

     This field pulls from the order header.

   - Comparison: "is equal to"
   - Right Operand: "literal." Enter Buyer's address book number

8. Click **OK**. The Processing Options window appears.

9. Enter the date range for which to run the report.

   The date is pulling from the order date (TRDJ) on the Purchase Order Header.

10. Click **OK**. The Printer Selection window appears.

11. Click **OK**. You will return to the main menu.

    View the Report via Submit Job or View Job Status. For step-by-step instructions, please refer to the Working with Submitted Reports work instructions. Choose the Job Details to view (R5743542…) once the Description is "Done".