PO Summary by Business Unit Report (R43415A)

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.

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 Department of Administrative Services website: http://www.das.state.ne.us/.

Navigation

Click Roles, Procurement or Inventory.

(Citrix users – right click on the menu, choose View by Role, choose Procurement or Inventory.)
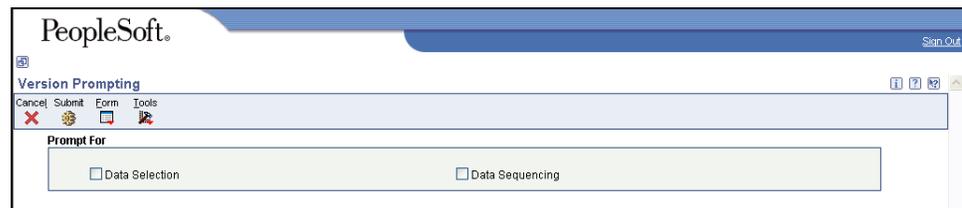
Purchasing - Agencies > Inquiries & Reports > Purchasing Reports > Procurement Reports > PO Summary by Business Unit

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

Steps

Run the Summary by Business Unit (Branch/Plant) 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. Report is setup to run on all Commodity Purchase Orders and all Direct Purchase Authority Orders.

    Agencies with stock supply Inventory must add ZP to the first row (on the List of Values Tab after clicking Literal).

    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. In the second row (Date - Requested), complete the following information:

    *   Right Operand – enter the beginning date of the date range for which to run the report.

        This field pulls from the Requested Date field in the order detail lines.

5. In the third row (Date - Requested), complete the following information:

    *   Right Operand – enter the end date of the date range for which to run the report.

6. Leave the fourth and fifth row as is. This report is set to run on orders between $2000 and $10,000.

    This dollar value may be changed to view a different dollar range.

7. In the next blank line, complete the following information:

    *   Left Operand – Business Unit (F4311) (MCU) [BC]

    This field pulls from the Business Unit field on the order detail lines.

    *   Comparison – is equal to

    *   Right Operand – enter the business unit (branch/plant) for which to run report

8. To run report for a specific vendor, complete the following information in the next blank line:

    *   Left Operand – Address Number (F4311) (AN8) [BC]

        This field pulls from the order detail lines.

    *   Comparison – is equal to

- Right Operand – enter the supplier's address book number

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

10. 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 (R43415A _…) once the Description is "Done".