

PO Summary by Supplier Report (R43415)

Overview

The PO Summary by Supplier report prints purchase order information for a specific supplier. You can review individual amounts for each purchase order, including the amount received against the PO and the amount open. You can also review the total amount for all purchase orders.

This report may be used to view Purchase Order stacking and potential contracts.

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 View by Role, choose Procurement or Inventory.)

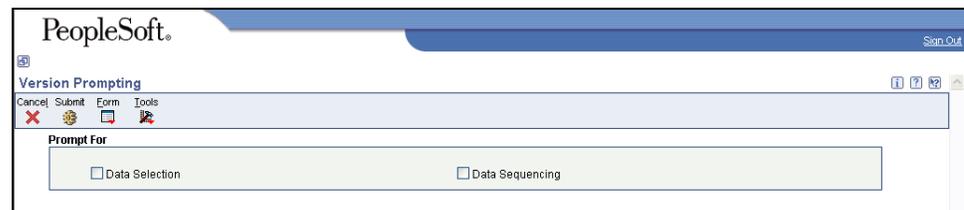
Purchasing - Agencies > Inquiries & Reports > Purchase Reports > Procurement Reports > PO Summary by Supplier, or

Inventory > Inquiries & Reports > Purchasing Reports > Procurement Reports > PO Summary by Supplier

Steps

Run the Summary by Supplier Report

Start this instruction from the Version Prompting window.



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

PeopleSoft. 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_20" |
| <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

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.
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.
 -  This field pulls from the Requested Date field on the order detail lines.
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. 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
8. Click **OK**. The Printer Selection window appears.
9. 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 (R43415 _...) once the Description is "Done".