

Report Basics

What is the purpose of this report?	What key business questions does this report answer?	Who uses this report?	How often is the report refreshed with data?
<p>A purchase order (PO) is a document requested by a department and issued by a buyer indicating the type, description, quantities and agreed-upon price for a product or service.</p> <p>The Purchase Order Summary provides summary information for purchase order processing, including PO status and revisions.</p>	<ul style="list-style-type: none"> What products or services were purchased by my Department for a particular month? What was the total dollar value of all POs entered last month for my Department? What PO line items have or have not been received? Has the purchase order been revised? 	<ul style="list-style-type: none"> Individuals with Financial Management functions at any level in an academic department program or center, and an administrative or central department. Individuals responsible for managing or tracking multiple departments, programs, sites or projects. 	<p>Nightly</p>

How do I navigate to the report?

1. Log into the Prime Portal (<http://prime.princeton.edu>).
2. Click the **Reporting** button to open the Cognos application.
3. Click the **Buying & Paying** folder.

Where do I go for additional help?

- For technical and business questions:
 - Until September 30, 2014:
 - Prime Support Center (PSC)
 - Phone (609) 258-7100
 - Email prime@princeton.edu
 - Starting October 1, 2014:
 - Financial Service Center or OIT Help Desk
- For training materials, go to the Prime portal (<http://prime.princeton.edu>) and navigate to **Information & Training > Training & Step-by-Steps > Financial Management & Reporting**.

Using the Report


What key prompts should I use to run the report?

Field	Description
Purchase Order From	Required field. Start date on which the PO was created in Prime Financials.
Purchase Order To	Required field. End date on which the PO was created in Prime Financials.
Purchase Order ID	System-generated PO number
Receipt Status	System status indicating receipt of products and services on the PO. Select one or more of the following: <ul style="list-style-type: none">Fully Received – All of the items on the PO were received.PO Not Received – None of the items on the PO were received.PO Partially Received – Some of the items on the PO were received.
Supplier Name	Name of the vendor that provided us with negotiated and preferred rates for travel services, goods and services through the Prime Marketplace, and goods and services provided through bided and sole supplier contracts. You can select one or more suppliers. When no selection is made, the report returns data for all suppliers.
Department	Organizational unit responsible for revenues and expenses, and typically contains people and a budget. You can select one or more Departments. When no selection is made, the report returns data for all Department.

What tips & tricks can help me use this report effectively?

- When you perform a search on the **Prompt** page, you can enter a wildcard (%) at the beginning, middle, and/or the end of your search criteria. Wildcards are used in place of unknown characters if you do not know the exact value for a prompt.
- For more information about navigating the **Prompt** page, refer to the [Cognos basic navigation courses](#).
- For more information about chartstrings and ChartFields, refer to the [Choose the Right ChartField](#) page on the Prime Portal.

Sample Report



Purchase Order Summary
 From Apr 1, 2014 To Apr 30, 2014

PO ID: All
 Receipt Status: All
 Supplier Name: All
 Department: 10400 - Real Estate-Prin Forr Ctr

Purchase Order ID	PO Date	Requestor/Buyer Name	PO Status	Receive Status*	Change Status	Dispatch Method	Supplier Name	Supplier ID	Supplier Location	Department	Total Amount
0000405211	4/9/14	Adam Smith	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Environmental Resources Management, Inc	850028334	Ewing, NJ	13105 - FIN-Capital Project Expense 10400 - Real Estate-Prin Forr Ctr	103,045.00
0000530286	4/9/14	Adam Smith	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Stantec Consulting Services Inc.	250125313	West Chester, PA	10400 - Real Estate-Prin Forr Ctr	3,700.00
0000530287	4/9/14	Adam Smith	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Stantec Consulting Services Inc.	250125313	West Chester, PA	10400 - Real Estate-Prin Forr Ctr	3,700.00
0000530805	4/9/14	Adam Smith	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Monmouth Nursery & Landscaping	850072695	Tennent, NJ	13105 - FIN-Capital Project Expense 10400 - Real Estate-Prin Forr Ctr	2,625.00
0000531348	4/9/14	Adam Smith	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Kale's Nursery & Landscape Service Inc	550002889	Princeton, NJ	10400 - Real Estate-Prin Forr Ctr 13105 - FIN-Capital Project Expense	11,384.00
0000531424	4/15/14	Jane Jones	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Tuckahoe Nurseries Inc.	650042876	Tuckahoe, NJ	13105 - FIN-Capital Project Expense 10400 - Real Estate-Prin Forr Ctr	9,140.00
FB07040075	4/15/14	Jane Jones	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Bunting Graphics, Inc.	250058799	Verona, PA	13105 - FIN-Capital Project Expense 10400 - Real Estate-Prin Forr Ctr	11,993.12
FC0004517D	4/15/14	Jane Jones	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Code Environmental Services	550127997	Carteret, NJ	10400 - Real Estate-Prin Forr Ctr	2,039,662.07
FC0004519D	4/15/14	Jane Jones	Dispatched	PO Not Received	Unchanged	Phone Dispatch	Clean Earth of North Jersey, Inc	250129504	Kearny, NJ	10400 - Real Estate-Prin Forr Ctr	5,880,638.41

Note: Sample report displays test data.

How do I interpret the report?

Column Name	Description
Purchase Order ID	PO number, which links to the Purchase Order Detail Report
PO Date	Date of the purchase order
Requester/Buyer Name	Name of the individual who entered the purchase requisition in Prime Marketplace
PO Status	Indicates one of the following statuses for the PO: <ul style="list-style-type: none">• Open – The PO has gone through the PO Build process and is awaiting the automatic approval process.• Dispatched – The PO has gone through the entire approval process and has been dispatched to the vendor by fax, mail, or phone.• Canceled – The PO has been entered, saved, and dispatched; however, a cancellation was performed. The PO can no longer be modified.• Completed – The PO has either gone through the entire purchasing cycle or it has been canceled and reconciled. The PO can no longer be modified.
Receive Status	Indicates if the products or services on the PO were fully received, not received, or partially received.

Column Name	Description
Change Status	Indicates if the PO was revised
Dispatch Method	Indicates how the products and services on the PO were transmitted to the supplier by fax, mail, phone, and so on.
Supplier Name	Name of the supplier
Supplier ID	Unique number identifying the supplier
Supplier Location	City and state where the supplier conducts business
Department	Number, abbreviation, and name of the Department, or Departments specified in the ChartFields.
Total Amount	Total amount of the PO