

KUPPS DEMIS PO Activity Report



The first screenshot shows the 'DEMIS Log On (KU Online ID)' page. It features a 'User name:' field with 'jondoe' entered, a 'Password:' field with masked characters, and a 'Log On' button. A red bracket labeled '1' encompasses the login fields. The second screenshot shows the 'DEMIS Portal' with tabs for 'General', 'Financials', 'Research', and 'Home'. The 'Financials' tab is selected, and a red arrow labeled '2' points to the 'PO Activity Report.srx' option in the list.

The KU Office of Institutional Research and Planning (OIRP) provides a PO Activity Report in DEMIS that tracks PO encumbrances and payment activity. This guide provides basic instruction on accessing and using the DEMIS PO Activity Report.

[Click here](#) for the full OIRP Tutorial on the DEMIS PO Activity Report.

1 Log On To DEMIS. Access to DEMIS is managed through OIRP. [Click here](#) to open the **DEMIS Log On** page. Type in the applicable **User name** and **Password** and click the **Log On** button.

2 Open the Report Tool. After the DEMIS Portal opens:

1. Click on the **Financials** tab.
2. Click on the **PO Activity Report.srx** option.

The screenshot shows the 'DEMIS Reporting - PO Activity Report' tool. It includes a 'View Report' button and a 'Summarize PO Rpt' section. The 'From' date is set to 'July 01, 1999 12:03:00 AM' and the 'To' date is 'Current date and time (June 10, 2013 03:51:50 PM)'. A red arrow labeled '3' points to the search icon in the 'Available:' list. Below, the 'Selected:' list shows '0000000001' with a red 'X' button next to it.

3 Clear the Tool and Open PO Search Options.

1. If there is pre-existing data already in the **Selected:** list, click on the number item and click the **X** button to remove it.
2. Click on the search icon to launch the PO search tool to load applicable PO numbers into the report.

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4 Enter PO Numbers for the Search.

1. In the **Search for Items that:** dropdown tool, select **Contains**.

2. Type in the full 10-digit PO number (KU00012345).

3. Click the **Search** button.

4. Click the **Search** button to load the PO into the **Selected:** list.

5 Load PO Numbers for the Search.

1. Click the **Select** button to populate the selected PO number(s) to the main report search tool.

2. Click on the **View Report** button.

6 Review PO Report summaries. PO Lifecycle Summary Reports will now display for each PO identified in step **4**. The following examples are illustrated:

A. Fully Invoiced and Paid PO – Encumbrance Fully Relieved

B. Un-invoiced PO – Full Encumbrance Remains

C. Partially Invoiced and Paid PO – Encumbrance Partially Relieved

7 Report Type Options. The following report options are also available. Click on the drop-down tool to select from:

- Summarize PO Rpt (default report that is illustrated)
- Detail report, Sum by PO
- Group By Vendor
- Vendor Pie Chart

8 Add Data Dynamically. Additional columns of data can be added to the report dynamically. From the list of options under the **Fin_Transaction_Map** list, drag and drop additional criteria into the report as is desired.

Business Unit	Vendor	Po Line Nbr	Voucher Id	Po Amount	Voucher Amt	PO Balance
UKANS	CDW GOVERNMENT LLC	1		23,180	0,000	23,18
UKANS	CDW GOVERNMENT LLC	1	5000867R	0,000	23,180	-23,18
Total				23,180	23,180	0,00

Business Unit	Vendor	Po Line Nbr	Voucher Id	Po Amount	Voucher Amt	PO Balance
KURBS	FISHER SCIENTIFLIC	1		136,400	0,000	136,40
Total				136,400	0,000	136,40

Business Unit	Vendor	Po Line Nbr	Voucher Id	Po Amount	Voucher Amt	PO Balance
KURBS	FISHER SCIENTIFLIC	1		94,240	0,000	94,24
KURBS	FISHER SCIENTIFLIC	1	8000869Z	0,000	94,240	-94,24
KURBS	FISHER SCIENTIFLIC	2		60,250	0,000	60,25
Total				154,590	94,240	60,35