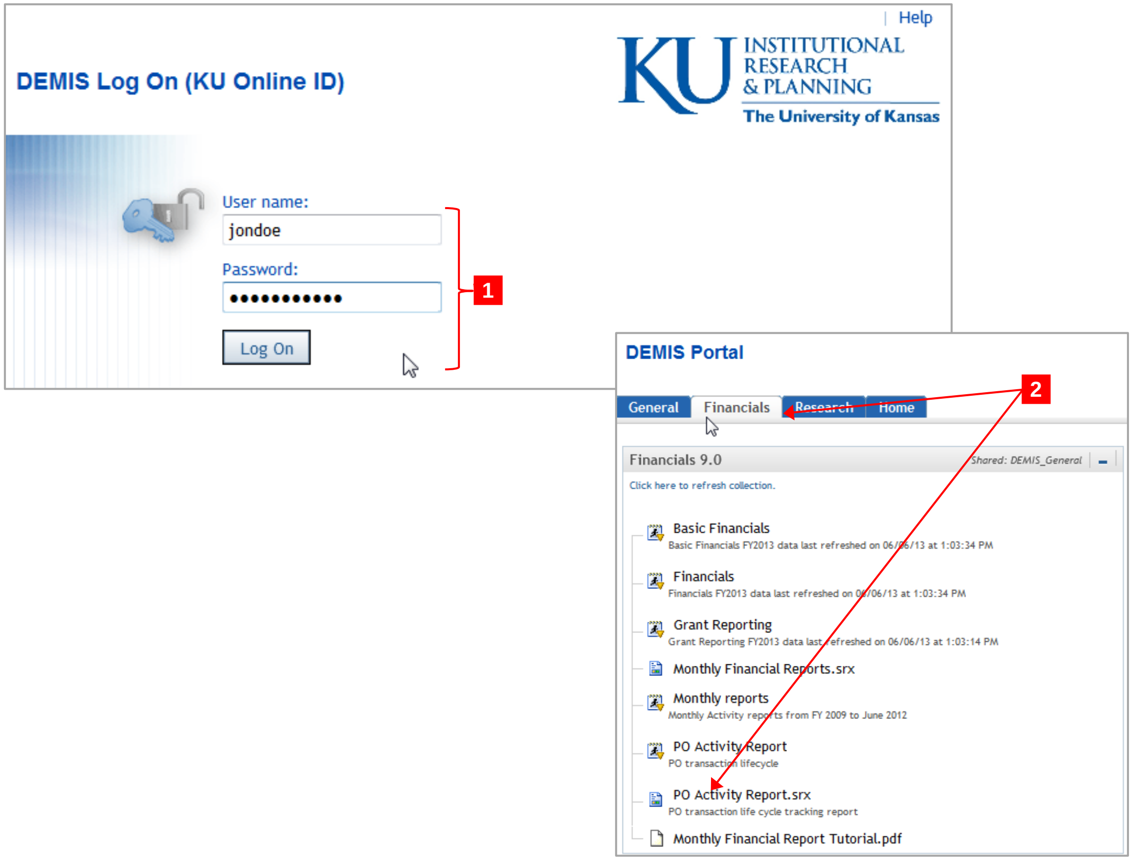
KUPPS DEMIS PO Activity Report

Procure To Pay System



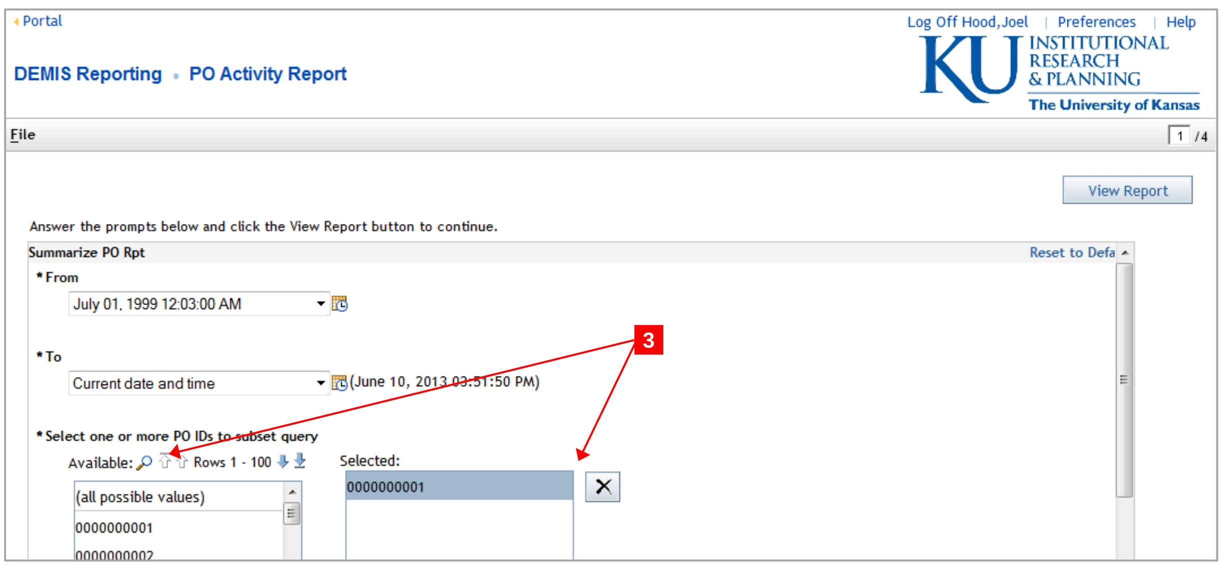
The KU Office of Institutional Research and Planning (OIRP) provides a PO Activity Report in DEMIS that tracks PO encumbrances and payment activity. This guide provides basic instruction on accessing and using the DEMIS PO Activity Report.

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.

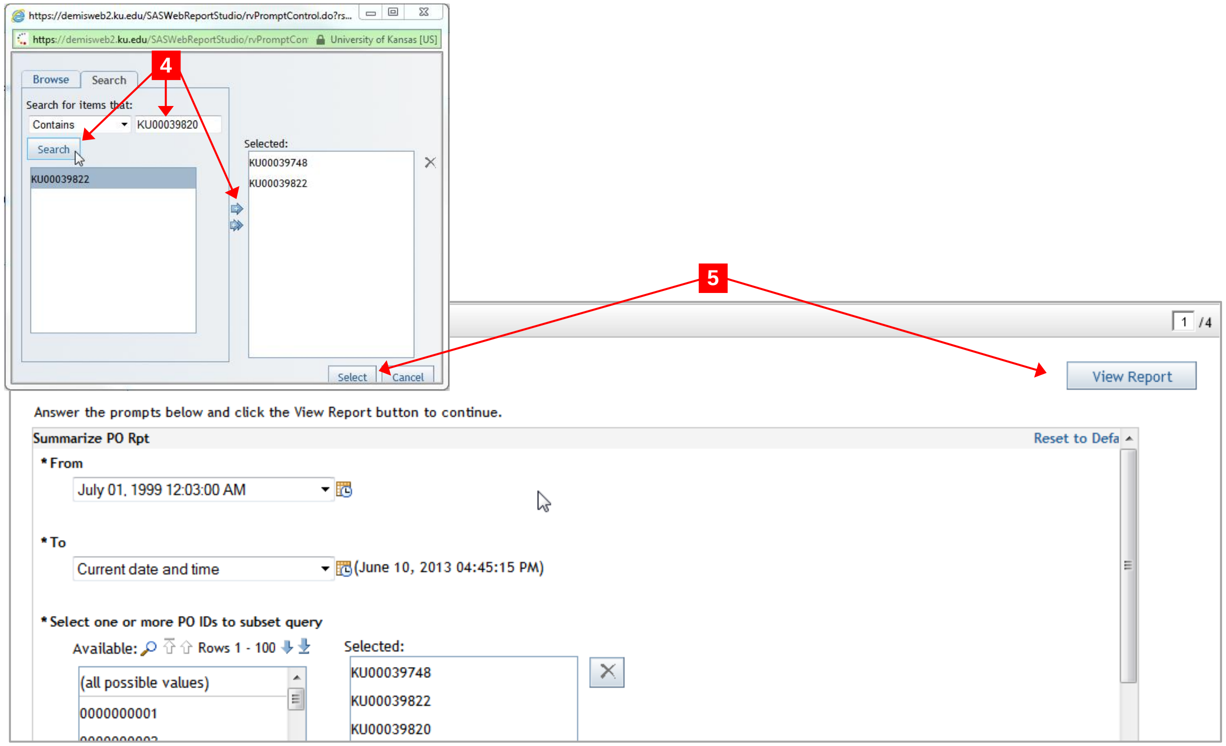


3 Clear the Tool and Open PO Search Options.

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

KUPPS DEMIS PO Activity Report

Procure To Pay System

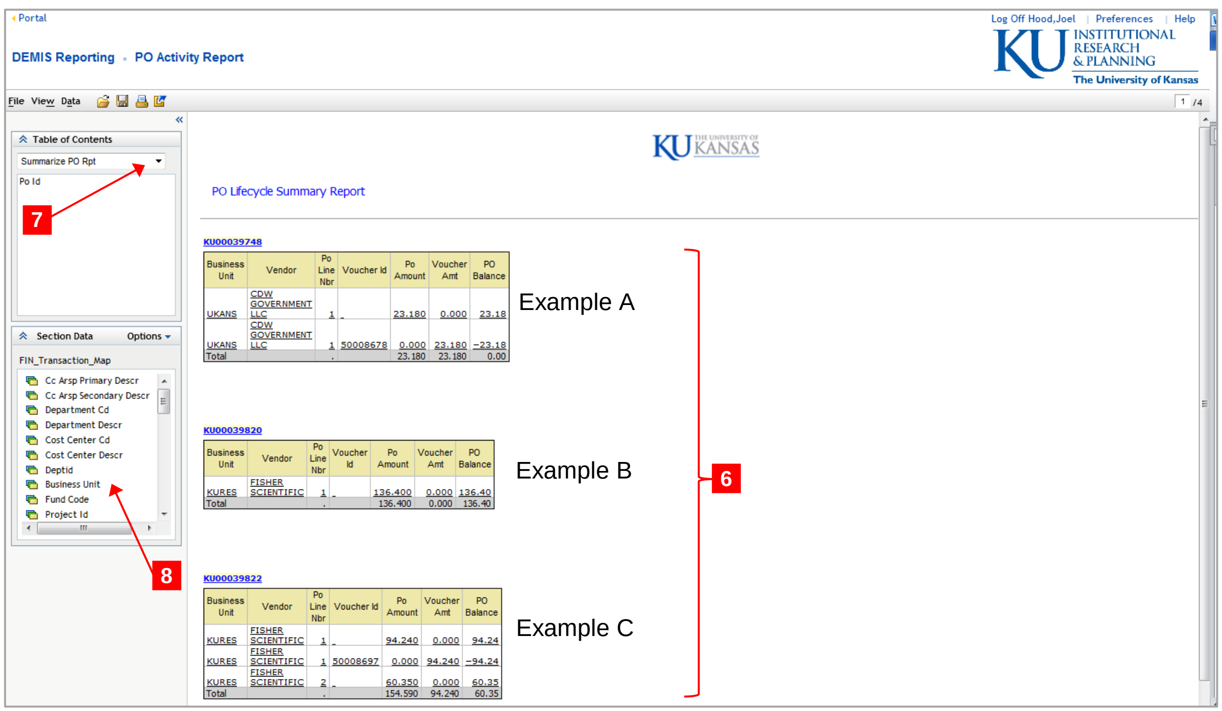


4 Enter PO Numbers for the Search.

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 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.