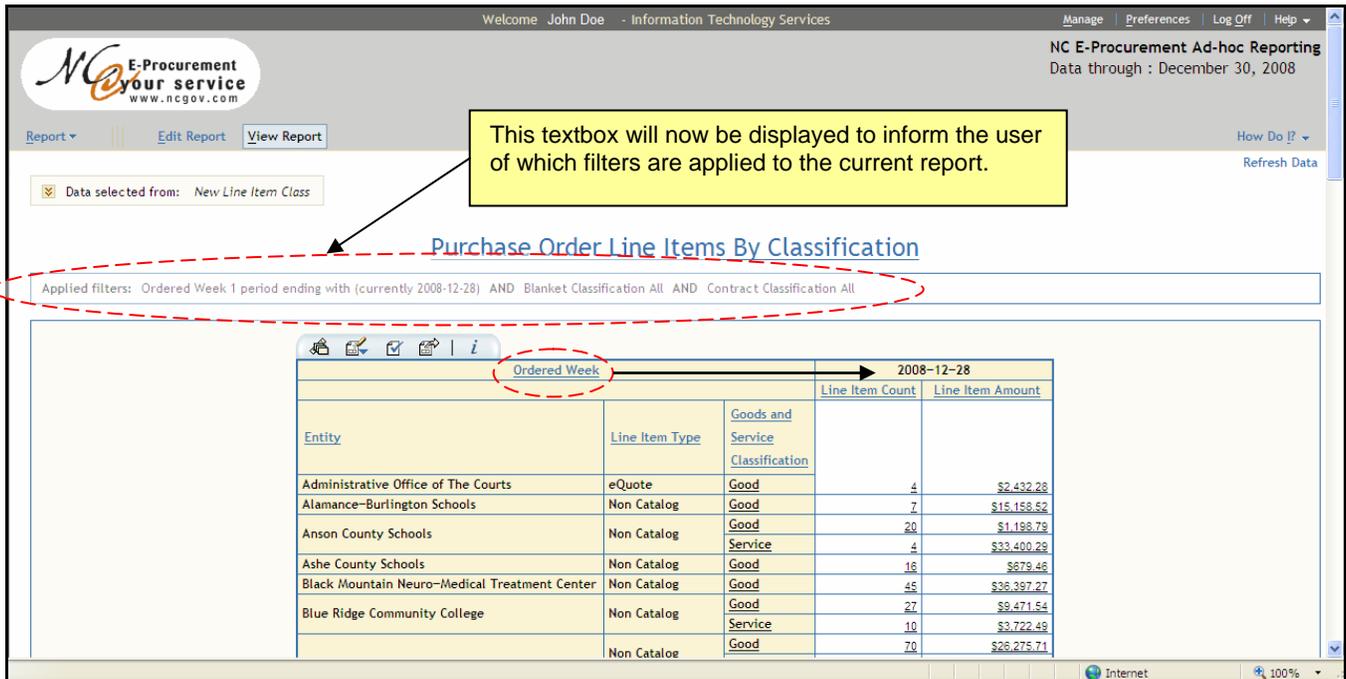


## Purchase Order Line Items By Classification Job Aid

The **Purchase Order Line Items By Classification** Report allows users to view the **Line Item Count** and **Line Item Amount**, based on **Line Item Type**, **Contract Classification**, and **Blanket Classification**. The default report displays data for the most recent **Ordered Week** for the entities in which the user has permissions. Users can utilize the filter and rank option in order to filter the report with specific values for the **Ordered Week**, **Entity**, **Line Item Type**, **Contract Classification**, or **Blanket Classification**.



Welcome John Doe - Information Technology Services

NC E-Procurement Ad-hoc Reporting  
Data through : December 30, 2008

Data selected from: New Line Item Class

**Purchase Order Line Items By Classification**

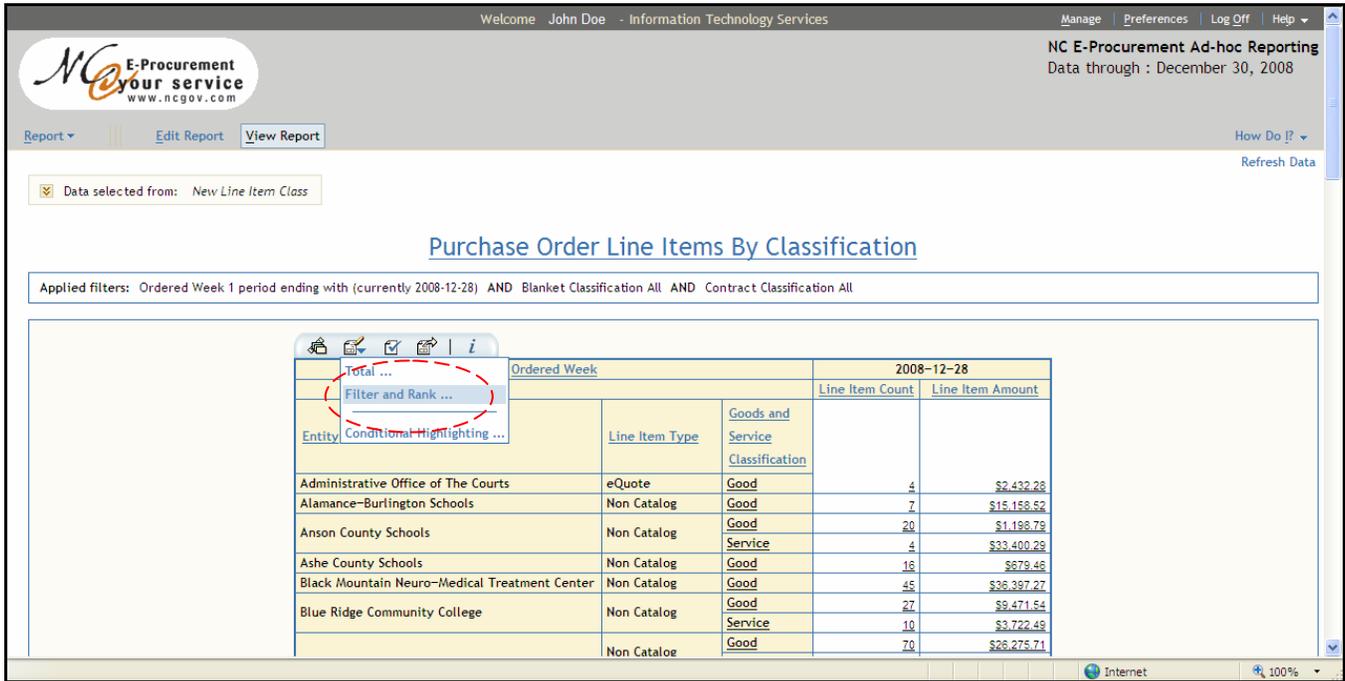
Applied filters: Ordered Week 1 period ending with (currently 2008-12-28) AND Blanket Classification All AND Contract Classification All

Entity	Line Item Type	Goods and Service Classification	Ordered Week	Line Item Count	Line Item Amount
			2008-12-28		
Administrative Office of The Courts	eQuote	Good		4	\$2,432.28
Alamance-Burlington Schools	Non Catalog	Good		7	\$15,158.52
Anson County Schools	Non Catalog	Good		20	\$1,158.79
Ashe County Schools	Non Catalog	Service		4	\$33,400.29
Black Mountain Neuro-Medical Treatment Center	Non Catalog	Good		16	\$679.46
Blue Ridge Community College	Non Catalog	Good		45	\$38,397.27
		Service		27	\$9,471.54
		Good		10	\$3,722.49
	Non Catalog	Good		70	\$26,275.71

1. The **Purchase Order Line Items By Classification** report will be displayed for the most recent Ordered Week.

**Note:** The '**Ordered Week**' is now displayed at the top of the report. Users can utilize the Filter and Rank option to specify the Ordered Weeks for which to run the report.

**Note:** The new '**Applied filters**' textbox will inform the user what filters are applied to the current report. For the default Summary Report, the applied filter is the most recent Ordered Week for all Entities for which the user has permission.



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Report ▾ | Edit Report | View Report | How Do I? ▾ | Refresh Data

Data selected from: New Line Item Class

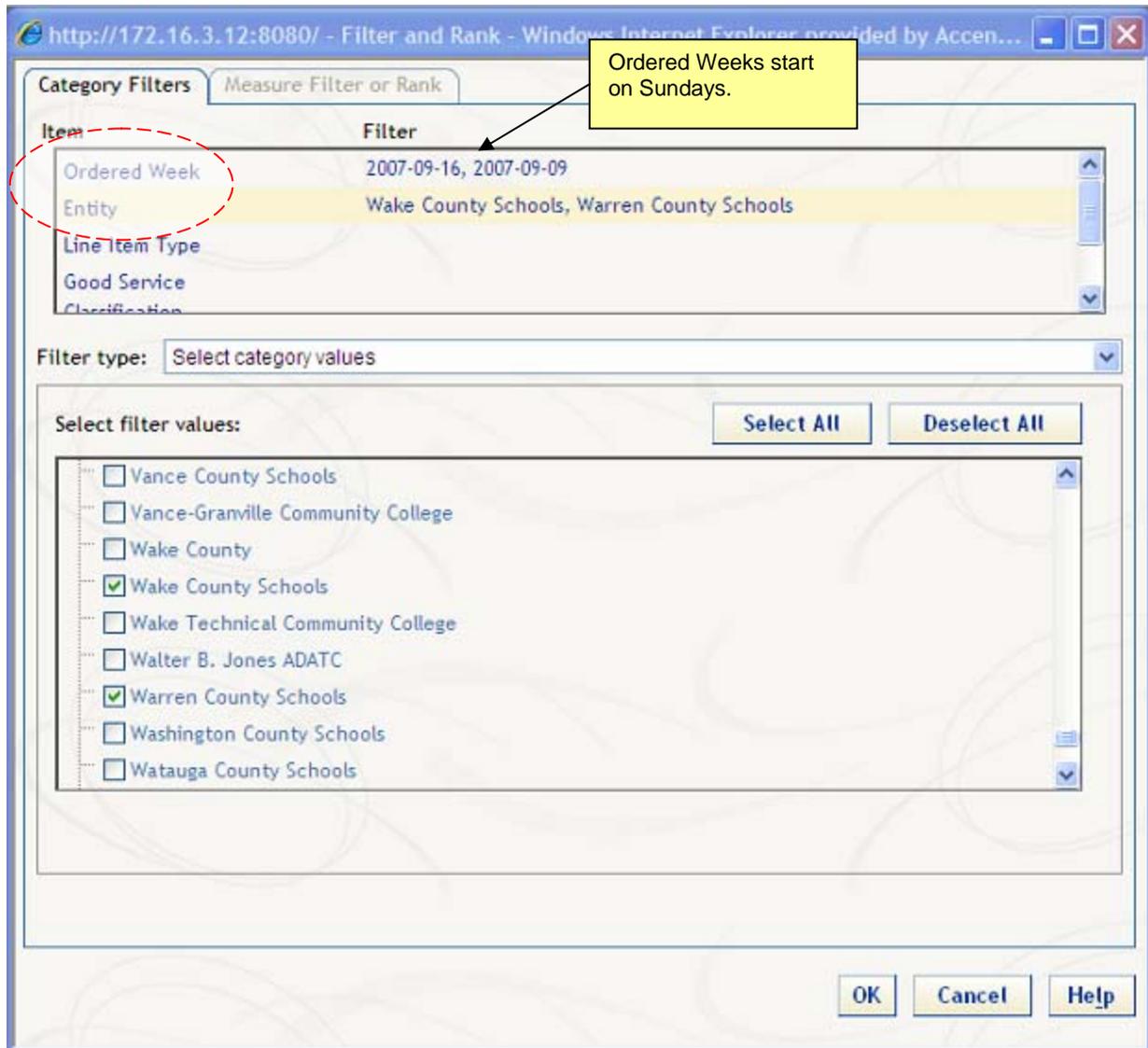
### Purchase Order Line Items By Classification

Applied filters: Ordered Week 1 period ending with (currently 2008-12-28) AND Blanket Classification All AND Contract Classification All

Total ...	Ordered Week	2008-12-28		
		Line Item Count	Line Item Amount	
Entity	Line Item Type	Goods and Service Classification		
Administrative Office of The Courts	eQuote	Good	4	\$2,432.28
Alamance-Burlington Schools	Non Catalog	Good	7	\$15,158.52
Anson County Schools	Non Catalog	Good	20	\$1,198.79
Ashe County Schools	Non Catalog	Service	4	\$33,400.29
Black Mountain Neuro-Medical Treatment Center	Non Catalog	Good	16	\$679.46
Blue Ridge Community College	Non Catalog	Good	45	\$36,397.27
		Service	27	\$9,471.54
		Good	10	\$3,722.49
	Non Catalog	Good	70	\$26,275.71

2. To create a more specific report, click the 2<sup>nd</sup> icon, 'Edit Table Options'.
3. Select the 'Filter and Rank' option.

**Note:** Filter and Rank can be used to display specific values of report attributes. It is not necessary to use Filter and Rank when you need all Entities, Line Item Types, and/or Goods and Service Classifications as they are displayed by default on the Summary Report.



4. Highlight the desired filter item.
5. Choose '**Select category values**' as the **Filter type**.
6. Select the checkboxes for the desired values.
7. Click '**OK**'.

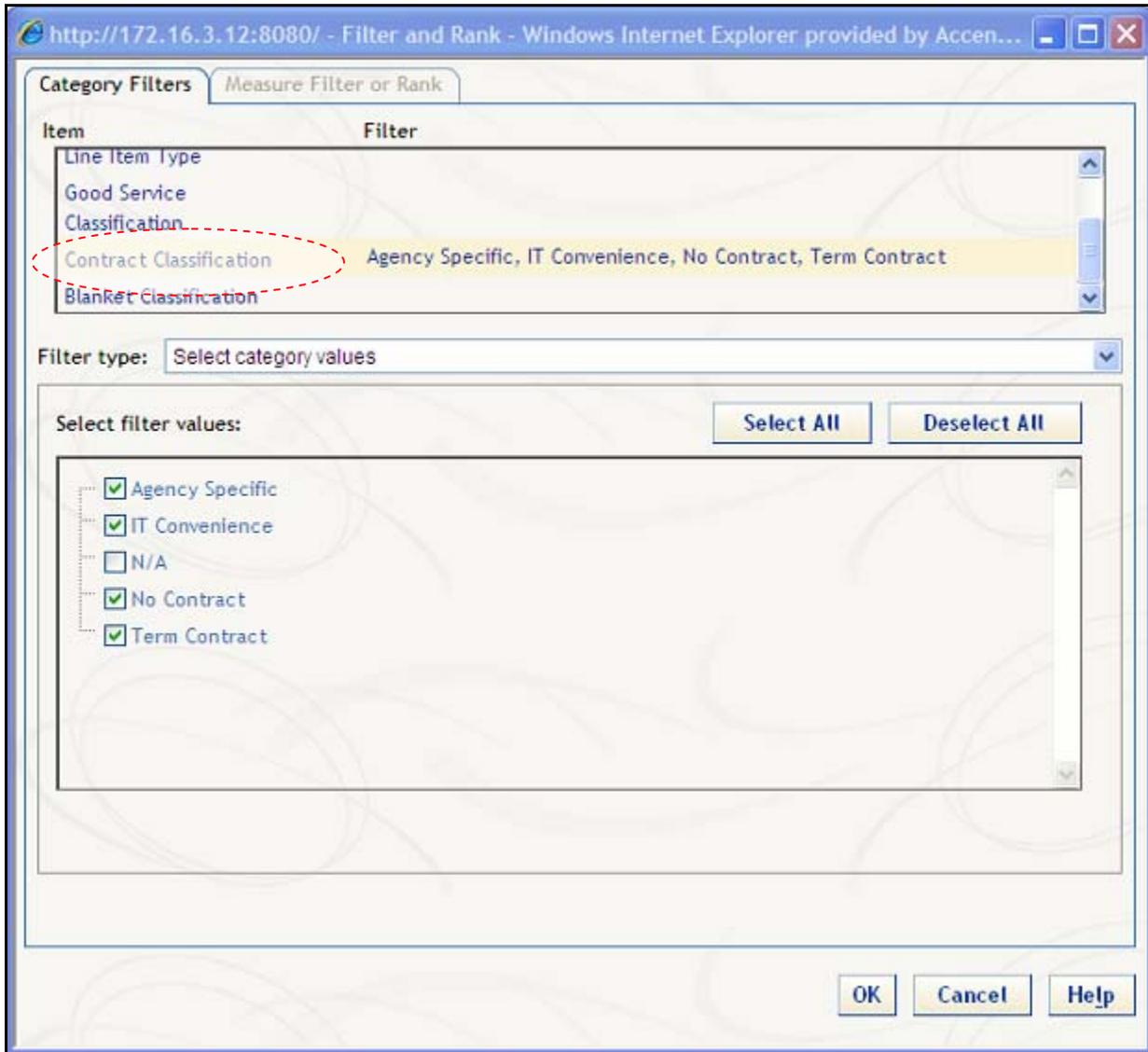
Applied filters: Entity equal to Wake County Schools, Warren County Schools AND Ordered Week equal to 2007-09-16, 2007-09-09 AND Blanket Classification All AND Contract Classification All

Ordered Week			2007-09-16		2007-09-09	
Entity	Line Item Type	Goods and Service Classification	Line Item Count	Line Item Amount	Line Item Count	Line Item Amount
Wake County Schools	Non Catalog	Good	164	\$50,287.17	280	\$311,469.41
		Service	56	\$2,243.45	84	\$6,376.84
Warren County Schools	Non Catalog	Good	146	\$67,797.41	57	\$162,260.66
	Edited Catalog	Good	1	\$5,647.29		
<b>Total</b>			<b>367</b>	<b>\$125,975.32</b>	<b>401</b>	<b>\$480,106.71</b>

Important Note: Please do not click the Report Total links.  
 (Values found in the gray cells.)

8. The report is regenerated to display data for the selected filters.

**Note:** The 'Applied filters' textbox displays the filters that were selected in the Filter and Rank option and are applied to the current report.



http://172.16.3.12:8080/ - Filter and Rank - Windows Internet Explorer provided by Accen...

Category Filters    Measure Filter or Rank

Item	Filter
Line Item Type	
Good Service	
Classification	
Contract Classification	Agency Specific, IT Convenience, No Contract, Term Contract
Blanket Classification	

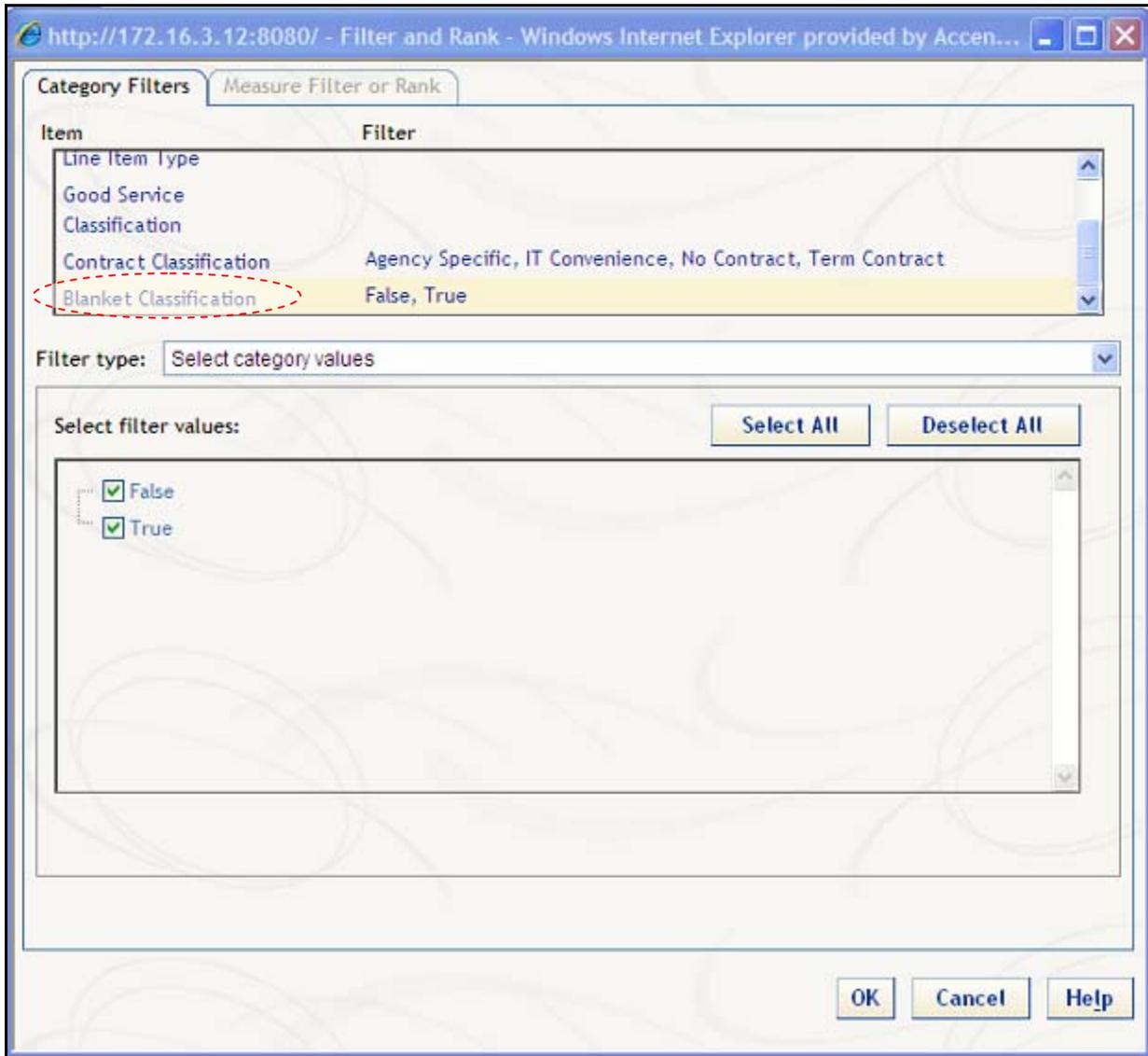
Filter type: Select category values

Select filter values:       

- Agency Specific
- IT Convenience
- N/A
- No Contract
- Term Contract

9. In order to run the report for a specific **Contract Classification** and **Blanket Classification**, open the Filter and Rank screen and select the **Contract Classification** item.
10. Choose '**Select category values**' as the **Filter type**.
11. Select the appropriate filter value(s).



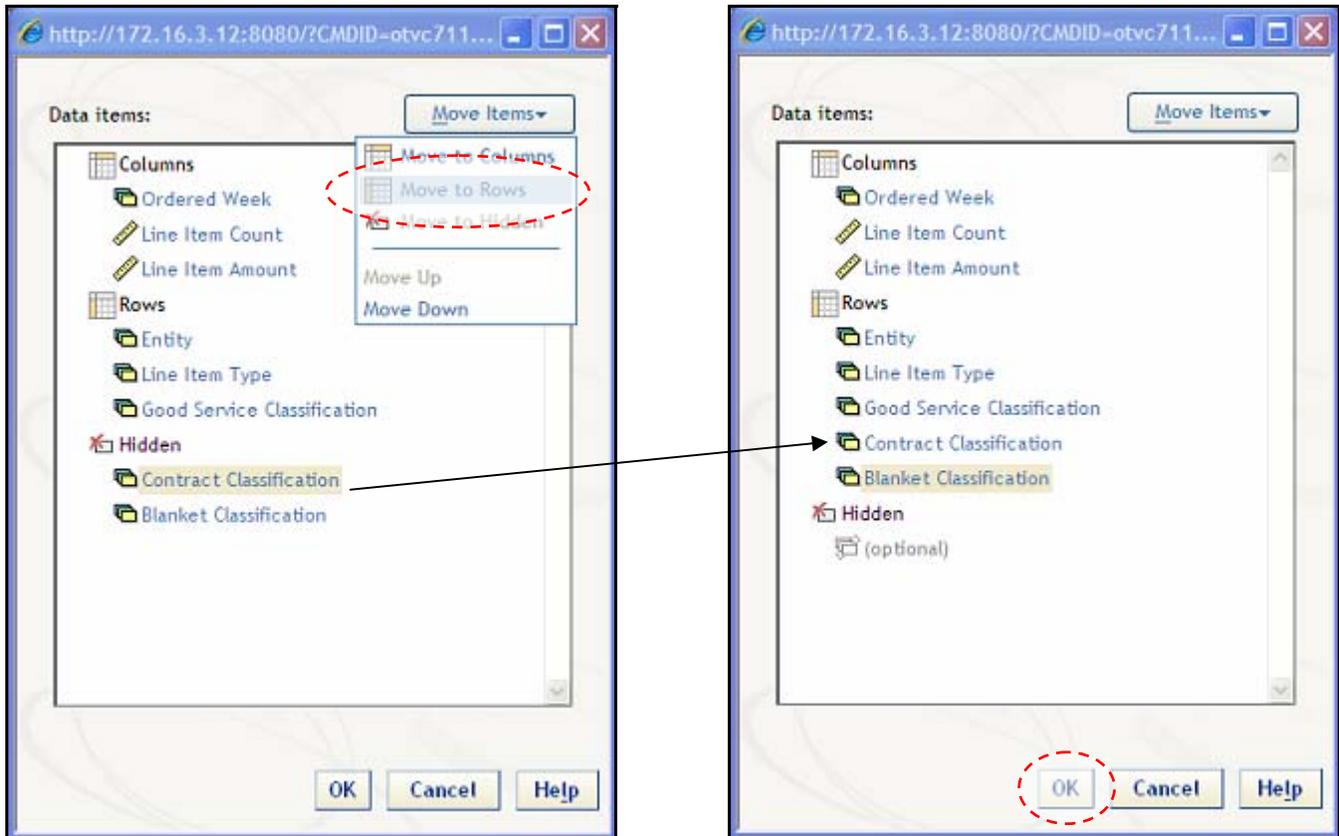
12. Select the **Blanket Classification** item.
13. Choose '**Select category values**' as the **Filter type**.
14. Select the appropriate filter value(s).
15. Click '**OK**'.

Applied filters: Blanket Classification equal to False, True AND Contract Classification equal to Agency Specific, IT Convenience, No Contract, Term Contract AND Entity equal to Wake County Schools, Warren County Schools AND Ordered Week equal to 2007-09-16, 2007-09-09

Entity	Line Item Type	Goods and Service Classification	2007-09-16		2007-09-09	
			Line Item Count	Line Item Amount	Line Item Count	Line Item Amount
Wake County Schools	Non Catalog	Good	164	\$50,287.17	280	\$311,469.41
		Service	56	\$2,243.45	64	\$6,376.84
Warren County Schools	Non Catalog	Good	146	\$67,797.41	57	\$162,260.66
	Edited Catalog	Good	1	\$5,647.29		
Total			367	\$125,975.32	401	\$480,106.71

Important Note: Please do not click the Report Total links.  
 (Values found in the gray cells.)

16. The report is regenerated displaying data for the selected filters. The **'Applied filters'** textbox displays the Blanket Classifications, Contract Classifications, Entities, and Ordered Weeks for which the report is currently filtered.
17. To display the data by each Blanket Classification and Contract Classification, click on the 1<sup>st</sup> icon, **'Table data'** .



**Note:** Contract Classification and Blanket Classification are currently '**Hidden**'; they must be moved to '**Rows**' to be displayed in the report.

18. Click on **Contract Classification**.
19. Click the '**Move Items**' button and choose, '**Move to Rows**'.
20. Click on **Blanket Classification**.
21. Click the '**Move Items**' button and choose, '**Move to Rows**'.
22. Contract Classification and Blanket Classification are now in the '**Rows**' section above Commodity Code. Click '**OK**'.



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Report ▾ | Edit Report | View Report How Do !? ▾

Refresh Data

☑ Data selected from: *New Line Item Class*

### Purchase Order Line Items By Classification

Applied filters: Blanket Classification equal to False, True AND Contract Classification equal to Agency Specific, IT Convenience, No Contract, Term Contract AND Entity equal to Wake County Schools, Warren County Schools AND Ordered Week equal to 2007-09-16, 2007-09-09

Ordered Week					2007-09-16		2007-09-09	
Entity	Line Item Type	Goods and Service Classification	Contract Classification	Blanket Classification	Line Item Count	Line Item Amount	Line Item Count	Line Item Amount
Wake County Schools	Non Catalog	Good	No Contract	False	163	\$49,987.17	279	\$270,817.41
		Service	No Contract	True	1	\$300.00	1	\$40,652.00
Warren County Schools	Non Catalog	Good	No Contract	False	56	\$2,243.45	64	\$6,376.64
	Edited Catalog	Good	Term Contract	False	148	\$67,797.41	57	\$162,280.66
					1	\$5,647.29		
<b>Total</b>					<b>367</b>	<b>\$125,975.32</b>	<b>401</b>	<b>\$480,106.71</b>

23. The report is regenerated to display Contract Classification and Blanket Classification.