

# HOW TO

## Generate a LSDBE Summary Report

**Purpose:** Office of Local Business Development (OLBD) manages the LSDBE certification of suppliers in the District. All agencies need to report the amount of spend that has been allocated to LSDBE suppliers. Further the agencies also may need to indicate whether the LSDBE supplier was 'Local' or 'Small' or 'Temporary', et cetera, and any other combination There are two PASS LSDBE reports, one which lists out the spend at the Order level (shows how much is awarded to a LSDBE supplier) and the other is at the Invoice Level (shows how much is actually paid out to the LSDBE supplier.)

To generate a report, Select **Reports** from the Navigation Panel on the left side of the screen near the bottom.

The screenshot displays the ARIBA Buyer 8.2 interface. On the left is a navigation panel with the following sections:

- To Do**
  - Approve Requests: 29
  - Watch Requests: 0
- Reconcile**
  - Invoices: 0
  - Charges: 0
- Status**
  - Composing: 6
  - Submitted: 1
  - Approved: 5
  - Denied: 0
- Create**
  - Requisition
  - Company eForm
- Explore**
  - Searches
  - Catalogs
  - Folders
  - Administrator
- Report**
  - Reports
- Receive**
  - Purchase Orders
- Analysis**
  - My Dashboard

The main content area features the ARIBA logo and the text "Buyer 8.2". A circular process diagram includes nodes for "Approve", "Receive", "Explore", "Create", and "Status". A "DC Links" menu is open, showing the following links:

- DC Website
- PASS Help Page**
- ASMP Home Page
- Training FAQs

An arrow points from the text above to the "Reports" link in the navigation panel.

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Select the Report Category **ORDERS** from the list of categories.

**1 Select Report Category**

Select a report category. The category determines the types of reports you can run.

- Accounting
- Direct Voucher
- Global Catalog Reports
- Invoicing
- Orders**
- PASS Users
- Receiving
- Requisition
- ROI
- System Error Codes

You currently have no saved report queries

Select the Report you want to run from the Category list (**LSDBE Order Summary**).

**2 Select Report**

Select a report. If you don't see the report you need, return to the previous screen and select a different category.

- Order Details by Accounting  
Lists accounting details such as comp obj, agency obj, index, pca, projects etc. of each order.
- Converted Order Details  
Lists detailed information for each order converted from SOAR.
- Spend by PIF#  
Summarizes supplier spend by PIF# accross agencies. Provides option to filter based on specific PIF #.
- LSDBE Order Summary**  
Summarizes LSDBE orders charged to particular agency.
- Non-LSDBE Order Summary  
Summarizes Non-LSDBE orders charged to particular agency.
- Order Details by Commodity and Supplier  
Lists details of each order.

You currently have no saved report queries

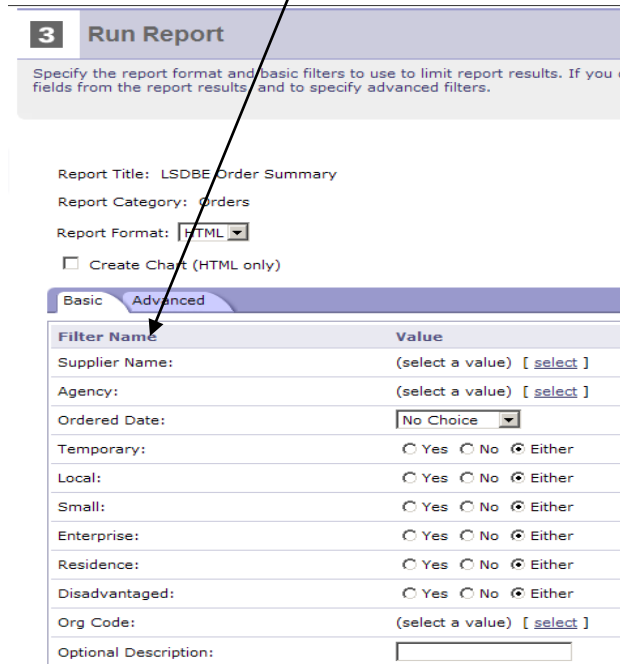
Select the appropriate filters. The filters define how the report will be displayed. (See note below for explanation on filters).

**E.g. 1** – If you select the Temporary Filter to 'Yes', and all other LSDBE categories as 'No Preference', you will get a report that shows you the Orders for suppliers who are Temporary, but can also be Local, Small, Residence...

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**E.g. 2** – If you select the Temporary Filter to 'Yes', and all other LSDBE categories as 'No', This is considered an 'AND' search. The results of the report show you the Orders for suppliers who are Temporary ONLY.



**3 Run Report**

Specify the report format and basic filters to use to limit report results. If you click on the fields from the report results, you can click on the fields to specify advanced filters.

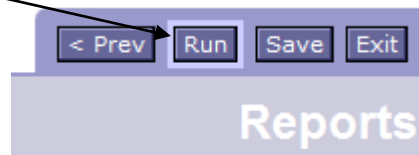
Report Title: LSDBE Order Summary  
Report Category: Orders  
Report Format: HTML  
 Create Chart (HTML only)

Basic | **Advanced**

Filter Name	Value
Supplier Name:	(select a value) [ select ]
Agency:	(select a value) [ select ]
Ordered Date:	No Choice
Temporary:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Local:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Small:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Enterprise:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Residence:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Disadvantaged:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Either
Org Code:	(select a value) [ select ]
Optional Description:	

All other filters on this page allow you to further restrict the search by 'Agency', 'Supplier' or a 'Date Range'

Select '**Run Report**'. The completed report will appear in a separate browser



There is another report that lists the amount paid out to the LSDBE Vendors. This is based on the Invoices sent by the vendors. The Invoice report is similar to the Order report. In the **Invoicing** Category select the '**LSDBE Order to Invoice Details**' report. The filters on this report are similar to the '**LSDBE Order Summary**' report.

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### Report Filters

The users can select various filters to create meaningful reports.

- Supplier Name – You can select 1 or more suppliers and the report results will be only for the specified supplier(s)
- Agency – Some users will be able to see reports across agencies (most users will see only their own Agency in the filter), they can select the number of agencies using this filter
- Ordered Date – You can select the time period for the report

### ADDITIONAL LSDBE FILTERS

The following are the LSDBE categories:

- Temporary
- Local
- Small
- Residence
- Enterprise
- Disadvantaged

You will be able to create reports by either one of the many LSDBE categories or by combining 2 or more LSDBE Categories. Each Category has 3 checkboxes in front of them.

- Yes - If you select 'Yes', the report will include that category in the report
- No - If you select 'No' the report will not show that category. (i.e. it will filter out that category)
- No Preference - If you select 'No Preference', the report will NOT filter out that category (So it will show you the "Yes" and the "No's").