

Why should I use Shopping Cart (SC) to Purchase Order (PO) Savings reports?

- The purpose of these reports is to illustrate how the Procurement Division saves LAUSD money on purchases that go through the Division.
- Leveraging reports that compare SC orders with POs, Procurement may show their customers the value of buyers.
- Note: The report does not take into consideration the bidding process when a contract is set in place.**

What SC to PO Savings reports are available?

- PC030 Shopping Cart to PO Savings - Summary**
 - This report provides a high level summary by Fiscal year
 - This report should be used in tandem with PC031 (details) to validate PC030 and better understand overall results
- PC031 Shopping Cart to PO Savings - Details**
 - This report provides more granular details on both the PO and Shopping Carts.
 - This report should be used to analyze the SC to PO % Savings

Where do I find the SC to PO Savings reports?

- Click on **Reports** tab
- Click on **Procurement/Contracts** subtab

Which security role will I need to access the SC to PO Savings reports?

- BP001_0000 BW Procurement Reporter

Things to consider when running the SC to PO Savings report:

- Business rules:**
 - SC total greater than zero will be displayed (less than zero hidden)
 - PO total greater than zero will be displayed (less than zero hidden)
- Exceptions:**
 - SC to PO % Savings and SC to PO Savings (PO Qty):
 - Greater than 5% = green
 - Less than -5% = red
 - The report uses two Shopping Cart Total calculations to compensate for a couple of Procurement Processes.
- Global Filters:**
 - Hide all Auto POs (These are purchase orders that the system converts from a Shopping Cart without a buyer physically touching the transaction)
 - Show only POs in Ordered Status
 - Cancel Purchase Orders do not show up in the report
- The first total is the "Shopping Cart Total" which takes the Quantity X Price (per line)
 - There are scenarios where Procurement Buyers reverse the Quantity and Price on the PO side and this is the best calculation to account for this scenario as the net effect is the true savings.
- The second is the "Shopping Cart with PO Quantity" this calculation takes the PO Quantity X the Shopping Cart Price.
 - Procurement may reduce or Increase the Quantity on the Purchase Order and the true change is to compare the difference in price; the "Shopping Cart with PO Quantity" is the best total to use in this situation.
- Note: If there is a mixture of scenarios where the buyer reduces/increases the quantity and reverses the PO Quantity and Price; the report information will be skewed and the best approach is to use the PC031 Shopping Cart to PO Savings - Details.**
- Both reports provide master data from the Shopping cart and purchase order such as Purchasing Group, Vendor, Product Category, etc.
 - This information may be used to compare detail changes from the shopping cart to purchase order.
- Funding Lines:**
 - A Shopping Cart can have multiple funding lines
 - The reports only show the FIRST funding line
 - It is for this reason, the reports do not show funding information
- Fund Centers:**
 - A Shopping Cart may have multiple Fund Centers that roll up into a Division
 - The report logic assumes that Fund Centers within a Shopping Cart all roll up into the SAME Division

Understanding report calculations:

(A) SC Unit Price	(B) SC Qty	(C) SC Per Unit	(E) PO Unit Price	(F) PO Qty	(G) PO Per Unit
$D = (A * B) / C$ SC Total			$H = (E * F) / G$ PO Total		
$I = D - H$ SC to PO Savings Amt and $J = (D - H) / D * 100$ SC to PO % Savings					

(A) SC Unit Price	(F) PO Qty	(C) SC Per Unit	(E) PO Unit Price	(F) PO Qty	(G) PO Per Unit
$K = (A * F) / C$ SC Total (Updated with PO Qty)			$H = (E * F) / G$ PO Total		
$L = K - H$ SC to PO Savings Amt (PO Qty) and $M = (K - H) / K * 100$ SC to PO % Savings (PO Qty)					

• PC030 SC to PO Savings Summary

Calculation Field Name	Calculation
$D = (A * B) / C$ SC Total	SC Net Price * SC Qty / SC Per Unit
$H = (E * F) / G$ PO Total	PO Net Price * PO Qty / PO Per Unit
$I = D - H$ SC to PO Savings Amt	SC Total [OB BP_SCVAL] – PO Total [OB BP_ASPVOC]
$J = (D - H) / D * 100$ SC to PO % Savings	(SC Total [OB BP_SCVAL] – PO Total [OB BP_ASPVOC]) / SC Total [OB BP_SCVAL] * 100
$K = (A * F) / C$ SC Total (Updated with PO Qty)	(SC Net Price * PO) / SC Per Unit
$L = K - H$ SC to PO Savings Amt (PO Qty)	SC to PO Savings Amt (Updated with PO Qty) [ZSCPOVAL] – PO Total [OB BP_ASPVOC]
$M = (K - H) / K * 100$ SC to PO % Savings (PO Qty)	(SC to PO Savings Amt (Updated with PO Qty) [ZSCPOVAL] – PO Total [OB BP_ASPVOC]) / SC to PO Savings Amt (Updated with PO Qty) [ZSCPOVAL] * 100

• **PC031 SC to PO Savings Detail**

Calculation Field Name	Calculation
(A) SC Unit Price	n/a
(B) SC Qty	n/a
(C) SC Per Unit	n/a
(E) PO Unit Price	n/a
(F) PO Qty	n/a
(G) PO Per Unit	n/a
$D = (A * B) / C$ SC Total	SC Net Price * SC Qty / SC Per Unit
$H = (E * F) / G$ PO Total	PO Net Price * PO Qty / PO Per Unit
$I = D - H$ SC to PO Savings Amt	SC Total [0BBP_SCVAL] – PO Total [0BBP_ASPVOC]
$J = (D - H) / D * 100$ SC to PO % Savings	(SC Total [0BBP_SCVAL] – PO Total [0BBP_ASPVOC]) / SC Total [0BBP_SCVAL] * 100
$K = (A * F) / C$ SC Total (Updated with PO Qty)	(SC Net Price * PO) / SC Per Unit
$L = K - H$ SC to PO Savings Amt (PO Qty)	SC to PO Savings Amt (Updated with PO Qty) [ZSCPOVAL] – PO Total [0BBP_ASPVOC]
$M = (K - H) / K * 100$ SC to PO % Savings (PO Qty)	(SC to PO Savings Amt (Updated with PO Qty) [ZSCPOVAL] – PO Total [0BBP_ASPVOC]) / SC to PO Savings Amt (Updated with PO Qty) [ZSCPOVAL] * 100