Purchase Order Analysis

Module Guide: Purchase Analysis (Purchase Order Analysis)

Module Location

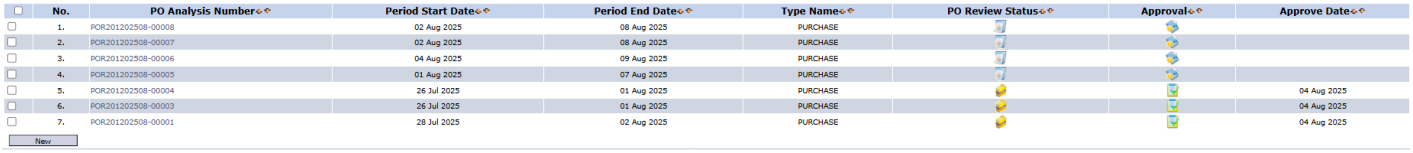
Purchasing > Purchase Order > Purchase Analysis

Module Objective

The **Purchase Analysis (Purchase Order Analysis/Review)** module serves as a tool to create, manage, and document the results of a review or analysis of purchasing activities within a specific period. Unlike a standard transactional report, this module is used to create a **formal analysis document** that can then be reviewed and approved by management.

1. Main View (Analysis List)

The main page of this module displays a list of all Purchase Analysis documents that have been created.



	No.	PO Analysis Number	Period Start Date	Period End Date	Type Name	PO Review Status	Approval	Approve Date
☐	1.	POR201202508-00008	02 Aug 2025	08 Aug 2025	PURCHASE			
☐	2.	POR201202508-00007	02 Aug 2025	08 Aug 2025	PURCHASE			
☐	3.	POR201202508-00006	04 Aug 2025	09 Aug 2025	PURCHASE			
☐	4.	POR201202508-00005	01 Aug 2025	07 Aug 2025	PURCHASE			
☐	5.	POR201202508-00004	26 Jul 2025	01 Aug 2025	PURCHASE			04 Aug 2025
☐	6.	POR201202508-00003	26 Jul 2025	01 Aug 2025	PURCHASE			04 Aug 2025
☐	7.	POR201202508-00001	28 Jul 2025	02 Aug 2025	PURCHASE			04 Aug 2025

New

View Explanation & Filters

This page is for viewing and managing all existing analysis documents.

- **Filters**: You can search for a specific analysis document by **PO Analysis Number**, **Type Name**, or a date range (**Date**

From / Date To).

- **Analysis List**: The table below will display all analysis documents that match the filters, with columns such as **PO Analysis Number**, **Period Start Date**, **Period End Date**, **PO Review Status**, and **Approval**.

Button Functions

- **New**: The primary button to create a new Purchase Analysis document.

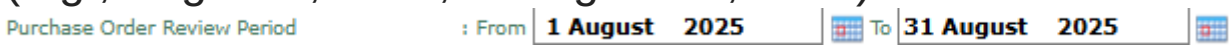
2. Steps to Create a Purchase Analysis

Step 1: Create a New Analysis

From the Main View, click the **New** button to open the **Add Purchase Order Review** form. 

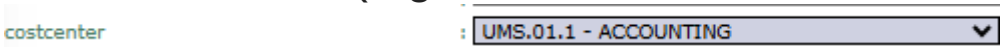
Step 2: Fill in Analysis Details

On the form that appears, fill in the necessary information:

- **Purchase Order Review Period**: Specify the **From** and **To** date range to define the purchasing period to be analyzed (e.g., August 1, 2025, to August 31, 2025).


- **Notes**: Write your notes or a summary of your analysis results in this field.


- **costcenter**: Allocate this analysis document to a specific cost center if needed (e.g., UMS.01.1 - ACCOUNTING).



- **Upload Data**: You can attach a supporting report file (for example, a processed data Excel file) via the **Choose File** button.



Step 3: Save and Confirm

After all data is filled in, use the buttons in the bottom-left section:

- **Save**: To save the analysis document as a draft. 

- **Confirm**: To finalize the document and send it into the approval workflow.



- **Back**: To return to the main page. 

Workflow & Integrated Business Process

- A Purchase Analysis document that has been **Confirmed** will go to the **Purchase Analysis Approval Inbox** to be reviewed and approved by management.

- This module is used to create **evaluation documents**, not to view raw transactions.

Tips & Important Notes

- Use this module to create periodic **performance evaluation reports** for the purchasing department (e.g., monthly or quarterly).

- Attach the processed Excel file from other purchasing reports to the **Upload Data** field to complete your analysis and present it in one centralized document.

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