



INSTRUCTIONS FOR NIGP SUMMARY TOOL

OBJECTIVE

This procedure will walk the user through setting up the *NIGP Summary Tool*.

ADDITIONAL INFORMATION

- Be sure to use a clean copy of this tool from the State Purchasing Division web site at <http://doas.ga.gov/state-purchasing/purchasing-tools/process-improvement-tools> each time you use it.
- This tool is to be used with purchase order data for detecting and correcting NIGP codes. This tool is to be completed as part of the annual self-audit required by Section 8.2.1 of the [Georgia Procurement Manual](#).
- Ensure that the NIGP Code column is a “text” column and not a “number” column. Simply formatting the column as “text” will not work; it must be opened in Excel as “text” or converted later. If the values are lined up on the right side of the cells, then the data is “number”; if they are to the left of the cells, then they are text. In order to **convert** the values from number to text, follow the instructions in the “*Text to Columns*” in Excel document found in the Additional Resource section on the web site shown above.
- These instructions assume that the user has already downloaded the purchase order data from PeopleSoft and created the *PO Workbook*. If assistance is needed with that, refer to the *Desktop Audit Requirements* document found on the State Purchasing Division web site. Scroll to the bottom of the page and open the “Compliance Tools” section by clicking on the “+” sign on the right-hand side of the screen.
- The *PO Analysis Checklist*, mentioned in Step #5 below, can also be found on this web site.

The “Green” tabs on this tool provide:

- Vendor Summary by PO -- Once this tab is “refreshed”, it provides purchase order spend totals by each vendor name.
- NIGP 5 Digit Summary – Once this tab is “refreshed”, it confirms whether those purchase orders coded as “Exempt” are listed on the NIGP Exempt List by NIGP Code.

The “Red” tabs on this tool provide:

- PeopleSoft NIGP List – This tab provides all 3-digit (Category) and 5-digit (Class) codes listed in the NIGP Directory and found in PeopleSoft. For a quick search for correct NIGP Codes, the user can use the Control Key + F to do a quick “find”. This will allow the user to look at the 3-digit Categories to ensure the correct 5-digit NIGP Code is found.
- NIGP Exempt List – This is the current NIGP Exempt List found on the State Purchasing web site that can be used for information only.

STEPS TO COMPLETE THE NIGP SUMMARY TOOL

1. Open the *PO Workbook*, “Multiple Purchase” tab, and copy all the purchase order lines to be reviewed for correct NIGP Codes. (Do not copy the “Column Header Row” when copying this PO line data from the *PO Workbook*.)

Option: A sample of purchase order lines can be chosen for review instead of copying all purchase order lines, if desired, but all lines selected must be copied together for the next step to be successful.

2. Open the NIGP Summary Tool, “Raw Data” tab, click in cell A4 (red) and paste all the data that was selected and copied from the PO Workbook.
3. Scroll to the right of the screen to see if columns T, U, and V are self-populated. These will be highlighted in “green”. Ensure that the formulas in those columns are copied to all rows of data.
4. Looking at the abbreviation (short name) in Column “F” used for Exempt purchases, go to cell F1 and type that abbreviation into the cell.
 - a. EXM is shown in the NIGP Summary Tool as an example of what the abbreviation may look like.
 - b. If the abbreviation is different in your PO data, then type the correct Exempt abbreviation or short name over this example.
 - c. NOTE: This step is important for the formulas to work properly in this tool for Exempt purchases.
5. Using the *PO Analysis Checklist*, “NIGP Code Review” section, determine if there are any errors or non-compliant issues for any purchase order lines in the NIGP Summary Tool. These instructions are also found below.

NIGP CODE REVIEW

Below is a list of things that should be validated during the review of NIGP Codes to ensure that buyers are coding purchase orders with the correct NIGP Code. The *NIGP Summary Tool* will assist in determining if the correct NIGP Code has been used. The tool can be found at <http://doas.ga.gov/state-purchasing/purchasing-tools/process-improvement-tools>. Each PO line should be reviewed to verify correct NIGP Code(s) were used.

1. Did the Purchase Order line(s) have a clearly defined, detailed, and adequate description?
 - a. Did the description used for the line item match the description reflected in the NIGP code?
2. Was the NIGP Code used at the five-digit level and not the three-digit category level (not ending in “00”)?
3. If the line item of the Purchase Order was for services, did the NIGP Code begin with the number nine (9)?
4. Were goods, services, and shipping separated per line item so that accurate NIGP code(s) were assigned to each type of purchase? (Please note: inventoried equipment MUST be identified per line item)