



# Buyers Work Centre: Autocreating

This process is only relevant to those departments who have staff with iProcurement Requisitioner responsibility. All approved requisitions will sit in the department's requisition pool within the Buyers Work Centre (BWC) awaiting creation into an order by a member of staff with an iProcurement Buyer Responsibility. Autocreating enables the amalgamation of item lines to the **same supplier** and **site**, therefore reducing potential cost of delivery charges as well as number of orders to the same supplier on the same day.

## Selecting Requisitions from the Pool

Responsibility      iProcurement Buyer  
Navigate              Buyers Work Centre > Requisitions

1. A screen will display with approved requisitions for autocreation.

Select	Requisition Line Item/Job	Qty	Unit	Price	Curr	Need-By	Source	Category	Creation Date	Foreign Curr	Supplier Unit Price	Item	Actions
<input type="checkbox"/>	689685.6 6 KNEELING CHAIR	1	EA	96.5	GBP	16-Jan-2014 00:00:00	FURNITURE@WORK LTD, GLASGOW	FC	09-Jan-2014 10:29:00				
<input type="checkbox"/>	689685.5 5 Nobo Laser Pointer P1	2	Each	5.11	GBP	16-Jan-2014 00:00:00	OFFICE DEPOT UK LTD, ZMARKETPLACE	KMF	09-Jan-2014 10:29:00		543678		
<input type="checkbox"/>	689685.4 4 Microsoft Comfort Curve 2000 Keyboard	1	Each	6.96	GBP	16-Jan-2014 00:00:00	MISCO UK LTD T/A MISCO & WSTORE, ZMARKETPLACE	KMD	09-Jan-2014 10:29:00		90411		
<input type="checkbox"/>	689685.3 3 Stabilo Boss Highlighters Assorted (Yellow blue Green Orange)	1	Pack	0.91	GBP	16-Jan-2014 00:00:00	OFFICE DEPOT UK LTD, ZMARKETPLACE	SKA	09-Jan-2014 10:29:00		537302		
<input type="checkbox"/>	689685.2 2 Rexel P240 Two Hole Punch Silver/Black	1	Each	2.72	GBP	16-Jan-2014 00:00:00	OFFICE DEPOT UK LTD, ZMARKETPLACE	SKG	09-Jan-2014 10:29:00		528073		
<input type="checkbox"/>	689685.1 1 Rexel P240 Two Hole Punch Silver/Black	1	Each	2.72	GBP	16-Jan-2014 00:00:00	OFFICE DEPOT UK LTD, ZMARKETPLACE	SKG	09-Jan-2014 10:29:00		528073		

2. You can view account code and tax information by drilling down on the **Requisition Number**. Once you have clicked on the number the requisition line displays and there is a link to the **Tax Information** in the Item Information section. Once clicked on you can then click on **Additional Tax Information**.



Please note that you cannot view the tax information on 11i requisitions.  
This is a system issue.

- To create requisitions lines to the same supplier with the same site address into an order click in the **Select** box for the relevant lines as per the following screenshot.

The screenshot shows the Demand Workbench interface with a table of requisition lines. The 'Add' button in the 'Select Reques' row is circled in red. The table contains the following data:

Select	Requisition Line Item/Job	Qty	Unit	Price	Curr	Need-By	Source	Creation Category	Date	Foreign Curr	Supplier Unit Price	Supplier Item	Actions
<input type="checkbox"/>	689685_6 6 KNEELING CHAIR	1	EA	96.5	GBP	16-Jan-2014 00:00:00	FURNITURE@WORK LTD, GLASGOW	FC	09-Jan-2014 10:29:00				
<input checked="" type="checkbox"/>	689685_5 5 Nobo Laser Pointer P1	2	Each	5.11	GBP	16-Jan-2014 00:00:00	OFFICE DEPOT UK LTD, ZMARKETPLACE	KMF	09-Jan-2014 10:29:00		543678		
<input type="checkbox"/>	689685_4 4 Microsoft Comfort Curve 2000 Keyboard	1	Each	6.96	GBP	16-Jan-2014 00:00:00	MISCO UK LTD T/A MISCO & WSTORE, ZMARKETPLACE	KMD	09-Jan-2014 10:29:00			90411	
<input checked="" type="checkbox"/>	689685_3 3 Stabilo Boss Highlighters Assorted (Yellow Blue Green Orange)	1	Pack	0.91	GBP	16-Jan-2014 00:00:00	OFFICE DEPOT UK LTD, ZMARKETPLACE	SKA	09-Jan-2014 10:29:00			537302	

- Once all lines to the same supplier have been selected, click the **Add** button and the lines will be added to the document builder that displays at the top right side of the screen.

It is important to check that the **Supplier** and **Site** fields populate. If they don't that indicates that items from different suppliers have been created into the same order. Follow steps on page 5 to correct this error.

- Click on **Create**

The Document Builder interface shows the following details:

- Type: New Order
- OU: Cambridge University
- Agreement: [Empty]
- Supplier: OFFICE DEPOT
- Site: ZMARKETPLAC
- Currency: GBP
- \* Style: Standard Purc
- Group Shipments
- Recently Added Items**
- Stabilo Boss Highlighters Assorted (Yellow Blue Green Orange) 1 Pack
- Nobo Laser Pointer P1 2 Each
- Number of Lines: 2
- Total: 11.13 GBP
- Buttons: Clear, Update, Create

- You will notice that the **Orders** tab now displays, with the order number.

7. From the above screen:

- a. Enter a **description** for the order.
- b. If this is a confirmation select **Yes** from the drop down list.
- c. Complete the **Bill-To** and **Ship-To**
- d. You can add Note to Supplier (please be aware that if it is a marketplace supplier then the message will not transmit but will remain on the order in CUFS).
- e. You can click on the other tabs to review the information.
- f. You can save the order as you may have further items to add to it during the day, (refer to page 4).

8. Review

a. **Incorrect Tax Code** can be amended:

- To check the tax code, click on the drop down list in the **Actions** field and select **Manage Tax, Go**.
- Click on **Update, Additional Tax Information** and amend the tax code accordingly.
- Click on **Apply** and then click on **Return to Update Standard Purchase Order**

b. **Incorrect Account Code**

There is no opportunity to correct these at this stage, apart from reject and then return the requisition for it to be amended, or amend the account code when the invoice is processed in AP.

9. If you have a **Non-Catalog** order that you need to add more lines to e.g. delivery charges, click on **Lines** tab, **Add 5 Rows** button and enter the information accordingly

**Please:**

- **do not use the Add 5 Rows button if it is a Marketplace Order as this causes significant issues when the order is being transmitted and impacts the processing of the invoice.**

- If coding to Grants then you can **Check Funds** from **Actions** at the top of the page and click **Go** and the relevant information screen will display, which you act upon accordingly.
- Final step is to **Submit** and a confirmation screen will display.

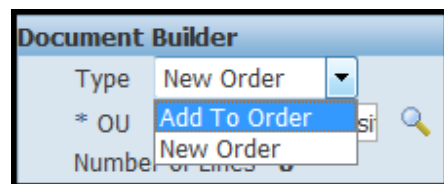
Marketplace orders will transmit electronically. Non-Cat orders will print as per Buyers print set up.

### Adding a requisition line to an unapproved purchase order

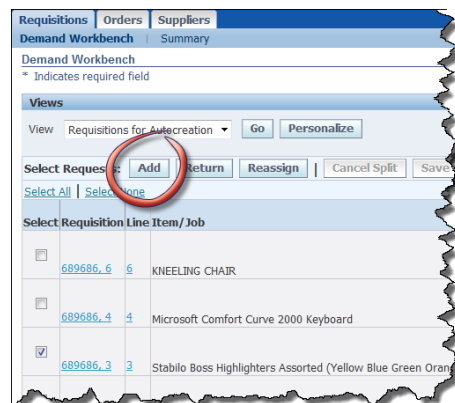
If you have an unapproved order, you can add requisition lines to the same supplier, supplier site order throughout the day, therefore submitting only one order.

**Responsibility** iProcurement Buyer  
**Navigate** Buyers Work Centre > Orders

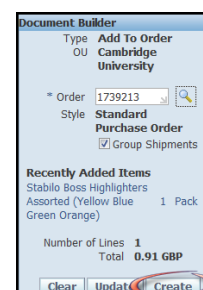
- First thing to do is find the Order number you are adding the requisition line to.
- The order will be listed as **Incomplete**. Make note of the number and click the **Requisitions** tab so that the Requisitions for Autocrecreation screen displays. Remember you can only add requisitions lines for the same supplier to the same order supplier.
- Amend** the document builder by clicking on the drop down arrow and selecting **Add to Order**.



- Select** the lines and click **Add**.



- The document builder will list the items, the **Order Number** you are adding to must be entered in the **Order** field.
- Click **Create**.
- The order will open and to view this you would simply click on the **Lines** tab and **Submit**.



## I added different supplier lines to the document builder

If lines from different suppliers are added to the document builder, the **Supplier** and **Site** fields will remain blank. Click on **Clear** if you have not yet created the lines into an order.

## I created different supplier lines into the same order

If the lines have already been created into an incomplete order, all lines will need to be returned to the requisition pool.

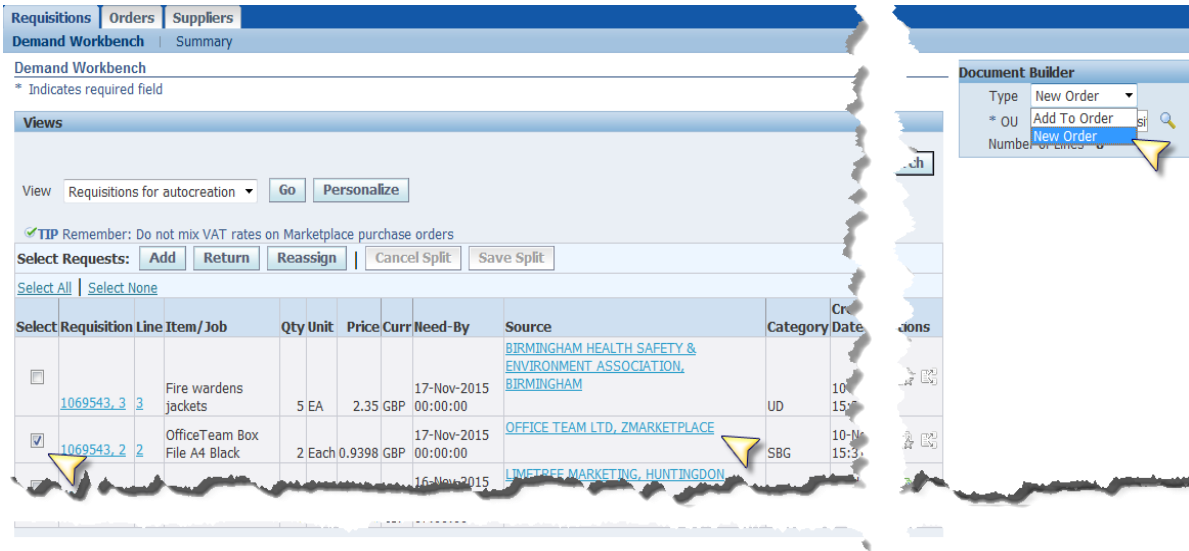
- Make note of the **Purchase Order** number.
- The supplier details at Header level will be blank
- Complete the **Ship –To location** (system won't let you move to the next step if this field is not populated)
- Click on the **Lines** tab
- Click on the **Bin** icon for all of the lines. For each line a warning message will display asking 'Are you sure you want to delete this record?'.

*Line	*Type	Item/Job	Description	Category	Qty	Unit	Price	Amount	Need-By/Start Date	Actions
1	Goods		OfficeTeam Bc	SBG	2	Each	0.9398	1.88	17-Nov-2015 C	[Bin]
2	Goods		CARD - GREEN	SFA	1	EA	3.5	3.50	16-Nov-2015 C	[Bin]

- Click **Yes** and the **Lines** tab will display with the remaining lines. Repeat the steps to delete the remaining lines.
- Click **Save**
- Click **Cancel** to display the autocreate pool, where the deleted lines will be listed ready for creating into orders with lines to the same supplier.

The order that was generated is incomplete and needs actioning. You can't simply delete or cancel an incomplete order so the best option is to use the incomplete order and add lines to it but for the same supplier.

- Once the deleted lines are back in the pool, **select** lines for the same supplier and site and make a note of the supplier information as this will need to be entered later in the process.
- In the **Document Builder** click on the **drop down list** and amend from **New Order** to **Add to Order**



- Click **Add** and a box will display in the **Document Builder** to enter the incomplete order number.
- Click on **Create** and the **Update Standard Purchase Order** screen will display for the following information to be manually entered:
  - **Supplier**
  - **Supplier Site:** will either default in based upon the supplier or click on the magnifying glass and select
  - **Communication method:** will either default in based upon the supplier or click on the magnifying glass and select
  - **Bill-To Location**
  - **Default Ship-To location**
  - **Submit** if the order is within your limit or **Approval Options** for forwarding the order if it is over your limit

## Returning a requisition from the pool to the requisitioner

If an item line needs to be returned from the autcreate pool due to incorrect information then even though it is an approved requisition in the pool it can still be done.



However, please **be aware** that if you are returning a requisition then it will return all lines from the requisition not just the one you have selected, unless the other lines have already been created into a purchase order.

Responsibility  
Navigate

iProcurement Buyer  
Buyers Work Centre > Requisitions

1. From the Requisitions for Autocreating screen **select** the requisition you are returning and click **Return**

Select Requisition Line Item/Job	Qty	Unit	Price	Curr	Need-By	Source	Category	Creation Date	Foreign Curr	Supplier	Unit Price	Item	Actions
689685.6 6 KNEELING CHAIR	1	EA	96.5	GBP	16-Jan-2014	FURNITURE@WORK LTD, GLASGOW	FC	09-Jan-2014 10:29:00					
689685.4 4 Microsoft Comfort Curve 2000 Keyboard	1	Each	6.96	GBP	16-Jan-2014	MISCO UK LTD T/A MISCO & WSTORE, ZMARKETPLACE	KMD	09-Jan-2014 10:29:00		90411			

2. A message will pop up and your next step is determined by the message!

**Warning**  
All lines on the selected requisitions will be returned except for those lines that are already placed on a purchase order.

3. If you are happy to proceed then enter a note in the **Reason** field and click **Apply**.

The requisitioner will receive an email advising of the return. They will click on the **Change** icon for the relevant requisition and whilst it will display all original item lines in the checkout screen there will be an icon that displays on the lines that have already been created into an approver purchase order therefore unable to make any amendments to them.