



The Buyers Work Centre: Searching

The Buyers Work Centre (BWC) has replaced the Purchase Order Summary Screen. It provides more flexibility when searching (whether orders, requisitions, suppliers), running and printing reports/orders. It is only available in iProcurement Buyer responsibility. You can export data from the search screens into Excel.

Purchase Order Summary Screen

Responsibility iProcurement Buyer
Navigate Buyers Work Centre > Orders and Requisitions tabs

1. When you navigate to orders, a list of purchase order headers you raised will display, showing summary header information as well as the matched amount to the invoice.
2. If you did not want to search by **Headers**, you can search by one of the other tab options: **Lines**, **Shipments**, and **Distributions** all of which will have different search fields.

Select	OU	Order	Rev	Description	Supplier	Site	Order Date	Total	Curr	Status	Acknowledgment	Buyer	Closure Status	Matched Amount
<input checked="" type="radio"/>	Cambridge University	1739327	0		OFFICE TEAM LTD	ZMARKETPLACE	03-Mar-2014 11:23:56	615.24	GBP	Approved		DARLOW, Mrs. Rebecca	Open	0.00
<input type="radio"/>	Cambridge University	1739317	0		OFFICE DEPOT UK LTD	ZMARKETPLACE	24-Feb-2014 07:39:34	19.56	GBP	Incomplete		DARLOW, Mrs. Rebecca	Open	0.00
<input type="radio"/>	Cambridge University	1739316	0		OFFICE TEAM LTD	ZMARKETPLACE	20-Feb-2014 13:15:03	2,372.10	GBP	Approved		DARLOW, Mrs. Rebecca	Open	2,372.10
<input type="radio"/>	Cambridge University	1739315	0		OFFICE TEAM LTD	ZMARKETPLACE	20-Feb-2014 13:15:03	2,372.10	GBP	Approved		DARLOW, Mrs. Rebecca	Open	2,372.10



If you wish to view all orders to a particular project then this can be done on the **Distributions** tab by adding an additional search field called **Project**.

Searching

When using the search facility, the parameters you can use will vary depending on which tab you had clicked on as per step 2 above.

This guide will display screenshots when searching on the Header tab.

1. Click on **Search** at the top right side of the screen.
2. Select whether you wish to show data when all or any conditions of your search are met.

Order is the purchase order number.

3. Enter the criteria you wish to search or use the drop down lists to select (the four fields opposite show as standard).
4. Click **Go**.
5. Search results will display accordingly.

The screenshot shows the 'Orders' search interface. At the top, there are tabs for 'Requisitions', 'Orders', and 'Suppliers'. Below the tabs, there are sub-tabs for 'Headers', 'Lines', 'Shipments', and 'Distributions'. The 'Search' section has two radio buttons: 'Show table data when all conditions are met.' (selected) and 'Show table data when any condition is met.'. There are four search fields: 'Order', 'Supplier', 'Buyer', and 'Approval Status', each with a dropdown menu and a search icon. Below the search fields are buttons for 'Go', 'Clear', 'Add Another', and 'Acknowledgment'. At the bottom, there is a table with columns: 'Select', 'OU', 'Order', 'Rev', 'Description', 'Supplier', and 'Site'. The table shows one result for 'Cambridge' with 'Order' 1739327 and 'Supplier' OFFICE TEAM LTD.

Additional Search Fields

The screenshot above shows only 4 fields for searching, but you can add in additional search parameters by clicking on the drop down arrow in the **Add Another field**.

This screenshot shows the 'Orders' search interface with the 'Add Another' dropdown menu open. The dropdown menu lists various search criteria: Acknowledgment, Approval Date, Approval Status, Bill-To Location, Buyer, Closed Date, Consumption Advice, Control Status, Currency, Description, Document Style, Firm, My Orders, Operating Unit, Order, Order Date, Pending Change Requests, Supplier, and Supplier Site. The 'Add Another' button is highlighted in blue.

If you wish to search by **Description** then you will need to enter in at least one other search criteria.

Some search criteria will require more than one search field completed.

% (the wildcard) can still be used when searching.

Viewing detailed order information

To drill down on an order, click on the **Order Number**. Once you have done this depending on the information you are looking for you can click on the tabs.

Detailed Procedure Buyers Work Centre: Searching

The screenshot shows the 'Standard Purchase Order 1739261' window in the 'Search' tab. The 'Header' section includes: Operating Unit (Cambridge University), Status (Incomplete), Supplier (OFFICE TEAM LTD), Supplier Site (ZMARKETPLACE), Supplier Contact (REMIT), and Communication Method (XML). The 'Terms' section includes: Bill-To Location (ZZ), Payment Terms (End +30 Days), and Default Ship-To Location (ZZ). The 'Instructions' section has fields for 'Note to Supplier' and 'Note to Receiver'. The total amount is 911.40 GBP. The buyer is DARLOW, Mrs. Rebecca, and the description is Highlighters and Laser. Buttons for 'Cancel', 'Actions', 'Rebuild Accounts', 'Go', 'Save', 'Approval Options', and 'Submit' are visible at the top and bottom.

Lines: This tab provides you with the description, category code, quantity, Unit of measure, price, Amount, and need-by date. The details button will provide you with a view of the line, shipping, and billing information.

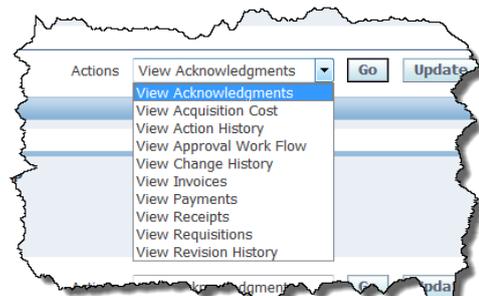
Shipments: As per lines but location code of where it is being delivered to. The details button will provide you with a view of the line, shipping, and billing information.

Distributions: As per lines but the addition of the code inputted for the expense.

Additional Views

At the top of the window there is an Actions box that enables you to view more related documents.

Simply select the view and click **Go**.



Viewing Tax Information

1. Once you have found your order and you wish to view the tax code, click on the **Order Number**. This will open the Standard Purchase Order Window.
2. Click on **Update**.
3. From the **Actions** field drop down arrow, select **Manage Tax** and click **Go**.

A warning message may display, if it does



click **Yes** as you may have to save your work.

The tax page of the order will display with the relevant item lines.

To view the tax information you can either click on **Show** for the relevant item line or click on **Additional Tax Information**.

Requisitions Orders Suppliers

Orders > Update Standard Purchase Order >

Tax: Standard Purchase Order 1739210

Additional Tax Information

Operating Unit Cambridge University
Supplier FURNITURE DIRECT LTD
Supplier Site CAMBRIDGE
Buyer DARLOW, Mrs. Rebecca
Order Description

Currency GBP
Amount 2,500.00
Nonrecoverable Tax 500.00
Recoverable Tax 0.00
Total Tax 500.00
Approval Amount 3,000.00

Search

Line
Line Description
Schedule
Location

Go Clear

Schedules Distributions

Shipments

Line	Description	Schedule	Location	Amount	Nonrecoverable Tax	Recoverable Tax	Total Tax
1	FURNITURE	1	LB	2,500.00	500.00	0.00	500.00

Return to Update Standard Purchase Order

Additional Tax Information

Searching Suppliers

This tab is useful if you would like to search the supplier database to check whether a supplier is already set up without having to come out of iProc.

1. Once you have clicked on the tab, complete the **Supplier Name** field and click **Go**.

Requisitions Orders Suppliers

Suppliers

Search

At least one search criteria is required. Including part of supplier's name or number will improve the search performance. Fields are case insensitive.

Supplier Name ridgeons
Supplier Number
Taxpayer ID
Tax Registration Number
D-U-N-S Number
Employee Number

Show More Options

Go Clear

Search Results

Supplier Name	Supplier Number	Parent Supplier Name	Taxpayer ID	Tax Registration Number	D-U-N-S Number	Employee Number	Update
RIDGEONS LTD	61982		2416904	599 6045 82			
RIDGEONS LTD T/A ANGLIA TOOL CENTRE	319308		2416904	599604582			

2. To view a supplier in more detail click on **Update** (although you can't actually update anything!) and a screen similar to the next one will display.

Suppliers >
Update RIDGEONS LTD - 61982: Quick Update
* Indicates required field

Supplier Name RIDGEONS LTD
Supplier Number 61982
Alternate Supplier Name
Registry ID 500764
Inactive Date
Alias

Purchase Order Hold All New Orders
Hold from Payment All Invoices
 Unmatched Invoices
 Unvalidated Invoices

Supplier Sites

Site Status Active Site Name Operating Unit

Key Purchasing Setups **Key Payment Setups**

Site Name	Operating Unit	Ship-To Location	Bill-To Location	Last Updated By	Last Update Date	Created By	Creation Date	Ship Via	Pay On	Alternate Pay Site	Invoice Summary Level	Create Debit Memo from RTS Transaction	Gapless Invoice Numbering	*Selling Company Identifier	Freight FOB Terms	Transportation Arranged	Country of Origin
ASHDON ROAD	Cambridge University			CP257	12-Jun-2007	DISABLEDG8321	28-Nov-2005					<input type="checkbox"/>	<input type="checkbox"/>			None	
CROMWELL RD	Cambridge University			DISABLEDRD399	11-Jan-2012	TRS29	18-Jun-2001					<input type="checkbox"/>	<input type="checkbox"/>			None	
NUFFIELD ROAD	Cambridge University			DISABLEDMFL30	09-Jul-2007	INTERFACE	13-Jul-2000					<input type="checkbox"/>	<input type="checkbox"/>			None	

- It will automatically display active sites for the supplier and who last updated the supplier record.

You can use any of the links on the left hand side to drill down further on the supplier however, there are a lot of fields that the University don't use.

Searching Requisitions

- When on the **Requisition** tab, the first screen that displays is the view of **Requisitions for Autocreation**.

If you just want to search requisitions, in the tab tool bar click onto **Summary**.

- This will display **Search parameters**.

You can add in additional search fields by clicking on the drop down list in **Add Another**.



Please note that when you are querying back and drilling down on a requisition raised in 11i, you will not be able to view the tax information.