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

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.

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.

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**.

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.
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**.

### 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**.

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.
3. 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**

1. 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.*

2. 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.