



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. Autocreate 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.

The screenshot shows the 'Demand Workbench' interface. At the top, there are tabs for 'Requisitions', 'Suppliers', and 'Orders'. Below the tabs, there are sections for 'Demand Workbench' and 'Saved Searches'. A table of requisitions is displayed with columns for Requisition, Item/Job, Qty, Unit, Price, Currency, Need By, Supplier, and Creation Date. The table contains 7 rows of data.

Requisition	Item/Job	Qty	Unit	Price	Currency	Need By	Supplier	Creation Date
2598543.2	Spatula 9370 Trulla Stainless Steel 178Mm X 209Mm Fisherbrand	2	Pack	7.59	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, ZMARKETPLACE	18-Oct-2024 13:58:47
2598543.1	Filter Paper, grade 1, 70mm	10	Ea.	2.47	GBP	19-Oct-2024 00:00:00	APPLETON WOODS LTD, ZMARKETPLACE	18-Oct-2024 13:58:47
2598542.4	Cryogenic marker pens, pack of 6	1	Pack	70.32	GBP	19-Oct-2024 00:00:00	APPLETON WOODS LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
2598542.3	Pen Marker	5	Pack	20.89	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
2598542.2	TEST TUBES 18MmX150MM	1	Ea.	84.56	GBP	19-Oct-2024 00:00:00	VWR INTERNATIONAL LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
2598542.1	Test Tube Rimless Polystyrene 3.5Ml 75 X 12Mm	2	Pack	29.98	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, ZMARKETPLACE	18-Oct-2024 13:55:34

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**.
3. 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.



Requisitions Suppliers Orders

Demand Workbench Summary

Demand Workbench

* Indicates required field

Saved Searches Search

Save Search Requisitions for autocreation Go Personalize

TIP Remember: Do not mix VAT rates on Marketplace purchase orders

Select Requisition **Add** Return Reassign Cancel Split Save Split

Requisition	Item/Job	Qty	Unit	Price	Currency	Need By	Supplier	Creation Date
<input type="checkbox"/> 2598542	2 TEST TUBES 18MMx150MM	1	Each	84.56	GBP	19-Oct-2024 00:00:00	VWR INTERNATIONAL LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
<input type="checkbox"/> 2598323	1 Chlamy strains order from the Chlamycollection. Total Cost is \$145	1	EA	114.110332887385	GBP	28-May-2024 00:00:00	UNIVERSITY OF MINNESOTA, USA1	21-May-2024 16:41:19
<input checked="" type="checkbox"/> 2597274	1 TWEEN 20, viscous liquid, cell culture tested	1	Each	51.97	GBP	27-May-2024 00:00:00	SCIENTIFIC LABORATORY SUPPLIES LTD, ZMARKETPLACE	20-May-2024 12:53:14
<input checked="" type="checkbox"/> 2598199	1 Meridian Bioscience HyperLadder 100bp - 100 Lanes	2	Each	74.1	GBP	28-May-2024 00:00:00	SCIENTIFIC LABORATORY SUPPLIES LTD, ZMARKETPLACE	21-May-2024 15:11:44
<input type="checkbox"/> 2598395	2 LINDY 19 CAT5e 3U 72 Port RJ-45 Patch Panel, Unshielded, Black	1	Each	134	GBP	19-Jun-2024 00:00:00	MISCO UK LTD TIA MISCO & WSTORE, ZMARKETPLACE	17-Jun-2024 12:48:15
<input type="checkbox"/> 2598396	3 Saturday Delivery before 12 noon (if item in stock)	1	Each	14.99	GBP	19-Jun-2024 00:00:00	MISCO UK LTD TIA MISCO & WSTORE, ZMARKETPLACE	17-Jun-2024 12:48:15

- 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**

Document Builder

Type New Order

OU Cambridge University

Agreement

Supplier SCIENTIFIC LA

Site ZMARKETPLAC

Currency GBP

* Style Standard Purch

Group Shipments

Recently Added Items

Meridian Bioscience HyperLadder 100bp - 100 Lanes	2	Each
TWEEN 20, viscous liquid, cell culture tested	1	Each

Number of Lines 2

Total 200.17 GBP



6. 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 (see section on adding lines to an unapproved order)

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 **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

Header **Lines** Shipments Distributions

Operating Unit Cambridge University

Add Lines: From Catalog Go Update with Excel 

* Line	* Type	Item/L...	* Description	* Category	Qty	Unit
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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.
10. 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.
 11. 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

1. First thing to do is find the Order number you are adding the requisition line to.

Requisitions Suppliers **Orders**

Orders

- 🔒 Indicates Supplier is editing the document
- 🕒 Indicates a pending change request
- 🔄 The document has open modification(s).

✔️ TIP To change tax, select the order, select Update, then press Submit

Headers Lines Shipments Distributions

Saved Searches

Saved Search: My Incomplete Orders [Go] [Personalize]

Select Order: Update [Submit] [Export] [...]

Select Order	Rev	Description	Supplier	Site	Creation Date	Or
<input checked="" type="radio"/> 4024030	0		SCIENTIFIC LABORATORY SUPPLIES LTD	ZMARKETPLACE	21-Oct-2024	21-
<input type="radio"/> 4024029	0		APPLETON WOODS LTD	ZMARKETPLACE	21-Oct-2024	21-
<input type="radio"/> 4024026	0		APPLETON WOODS LTD	ZMARKETPLACE	17-Oct-2024	17-

2. The order will be listed as **Incomplete**. Make note of the number and click the **Requisitions** tab so that the Requisitions for Autocreating screen displays. Remember you can only add requisitions lines for the same supplier to the same order supplier.

3. **Amend** the document builder by clicking on the drop down arrow and selecting **Add to Order**.

Document Builder

Type: Add To Order [v]

* OU: Cambridge Univers [Q]

Number of Lines: 0

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

Saved Searches

Saved Search: Requisitions for autocreation [Go] [Personalize]

✔️ TIP Remember: Do not mix VAT rates on Marketplace purchase orders

Select Requests: **Add** [Return] [Reassign] [Cancel Split] [Save Split] [...]

Requisition	Item/Job
<input checked="" type="checkbox"/> 2598545, 1	7ml Bijou, no label, plastic cap, APPLETON
<input type="checkbox"/> 2598543, 2	Spatula 9370 Trulla Stainless Steel 176Mm X 20Mm Fisherbrand



- The document builder will list the items, the **Order Number** you are adding to must be entered in the **Order** field.

Document Builder

Type Add To Order
OU Cambridge University

* Order 4024030

Style Standard Purchase Order

Group Shipments

Recently Added Items

7ml Bijou, no label,
plastic cap,
APPLETON 2 Pack

Number of Lines 1

Total 59.90
GBP

Clear Update Create

- Click **Create**.

- The order will open and to view this you would simply click on the **Lines** tab and **Submit**

Requisitions Suppliers Orders

Requisitions: Demand Workbench >
Update Standard Purchase Order 4024030

* Indicates required field
TIP To change tax: go to Actions > Change amount > Go then Manage Tax > Go

Search

Header Lines Shipments Distributions

Operating Unit Cambridge University Status Incomplete

Line	Type	Item/Job	Description	Category	Qty	Unit	Price	Amount	Need-By/Start Date	Actions
1	Goods	TWEEN 20	LK		1	Each	51.97	51.97	27-May-2024 00:00	[Edit] [Delete]
2	Goods	Meridian Bioscience	LC		2	Each	74.1	148.20	28-May-2024 00:00	[Edit] [Delete]
3	Goods	7ml Bijou, no label	LC		2	Pack	29.95	59.90	22-Oct-2024 00:00	[Edit] [Delete]

Cancel Actions Check Funds Go Save Approval Options **Submit**

Total 250.07 GBP



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?'.

Orders

Requisitions: Demand Workbench >

Update Standard Purchase Order 3414951

* Indicates required field

✔ **TIP** To change tax go to Actions > Change amount > Go then Manage Tax > Go

Search

Operating Unit Cambridge University										Status Incomplete
* Line	* Type	Item/J...	* Description	* Category	Qty	Unit	Price	Amount	Need-By/Start D...	Actions
1	Goods		Filter Paper, grade 1,	LK	20	E	3.02	60.40	27-Oct-2021	
2	Goods		ALKANE STANDARD	LCG	1	E	33.6	33.60	06-May-2021	

- 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**

The screenshot shows the 'Demand Workbench' interface. At the top, there are tabs for 'Requisitions', 'Suppliers', and 'Orders'. Below this, there are sub-tabs for 'Demand Workbench' and 'Summary'. A 'Document Builder' panel is visible on the right, with a dropdown menu set to 'Add to Order' and a search field containing 'Cambridge University'. The main area displays a table of requisitions with columns for Requisition, Item/Job, Qty, Unit, Price, Currency, Need-By, Supplier, and Creation Date. The table contains five rows of data, with the second and fifth rows highlighted in blue. Below the table, there are buttons for 'Add', 'Return', 'Reassign', 'Cancel Split', and 'Save Split'.

Requisition	Item/Job	Qty	Unit	Price	Currency	Need-By	Supplier	Creation Date
<input type="checkbox"/> 2598543, 2	Spatula 9370 Trulla Stainless Steel 176Mm X 20Mm Fisherbrand	2	Pack	7.59	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, ZMARKETPLACE	18-Oct-2024 13:56:47
<input checked="" type="checkbox"/> 2598542, 3	Pen Marker	5	Pack	20.89	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
<input type="checkbox"/> 2598542, 2	TEST TUBES 18MMx150MM	1	Each	84.56	GBP	19-Oct-2024 00:00:00	VWR INTERNATIONAL LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
<input checked="" type="checkbox"/> 2598542, 1	Test Tube Rimless Polystyrene 3.5Ml 75 X 12Mm	2	Pack	29.98	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, ZMARKETPLACE	18-Oct-2024 13:55:34
							LIFE TECHNOLOGIES LTD (INVITROGEN DIVISION), ZMARKETPLACE	

- 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 autocreate 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 iProcurement Buyer
Navigate Buyers Work Centre > Requisitions

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

Demand Workbench

* Indicates required field

Saved Searches

Saved Search: Requisitions for autocreation [Go] [Personalize]

TIP Remember: Do not mix VAT rates on Marketplace purchase orders

Select Requests: [Add] [Return] [Reassign] | [Cancel Split] [Save Split] | ...

Requisition	Item/Job	Qty	Unit
<input type="checkbox"/>	2598543, 2 Spatula 9370 Trulla Stainless Steel 176Mm X 20Mm Fisherbrand	2	Pack
<input checked="" type="checkbox"/>	2598542, 3 Pen Marker	5	Pack
<input type="checkbox"/>	2598542, 2 TEST TUBES 18MMx150MM	1	Each

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

Requisitions | Suppliers | Orders

Demand Workbench | Summary

Requisitions: Demand Workbench

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

Return Requisition Lines [Cancel] [Apply]

* Indicates required field

Reason:

Return Entire Requisition
(Uncheck the above checkbox to return only the selected line(s))

Requisition	Item/Job	Qty	Unit	Price	Currency	Need-By	Supplier	Creation Date	Deliver-To	Remove
2598542, 3	Pen Marker	5	Pack	20.89	GBP	19-Oct-2024 00:00:00	FISHER SCIENTIFIC UK LTD, 2MARKETPLACE	18-Oct-2024 13:55:34	PD	

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 approved purchase order therefore unable to make any amendments to them.