

Buyers Work Centre: Autocreating

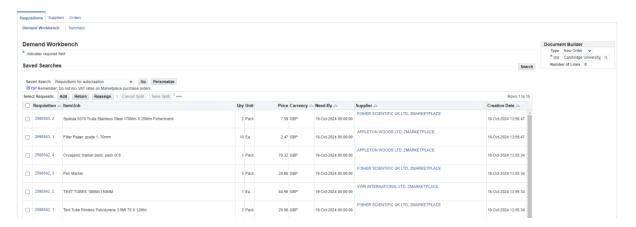
This process is only relevant to those departments who have staff with iProcurement Requisitioner responsibility. All approved requisitions will sit in the department's requisition pool within the Buyers Work Centre (BWC) awaiting creation into an order by a member of staff with an iProcurement Buyer 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

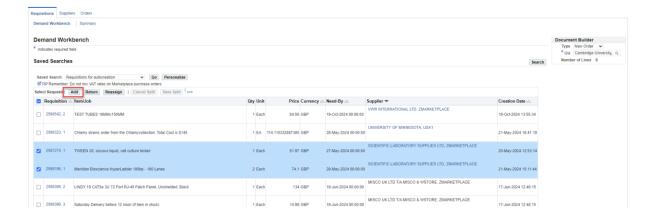
Navigate Buyers Work Centre > Requisitions

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



- 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. Once clicked on you can then click on **Additional Tax Information**.
- 3. To create requisitions lines to the <u>same supplier with the same site address</u> into an order click in the <u>Select</u> box for the relevant lines as per the following screenshot.

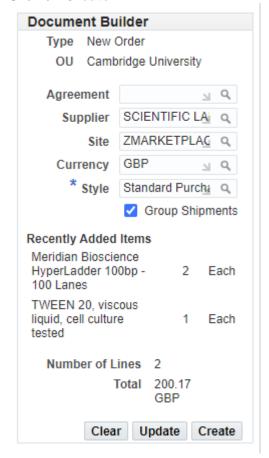




 Once all lines to the same supplier have been selected, click the Add button and the lines will be added to the document builder that displays at the top right side of the screen.

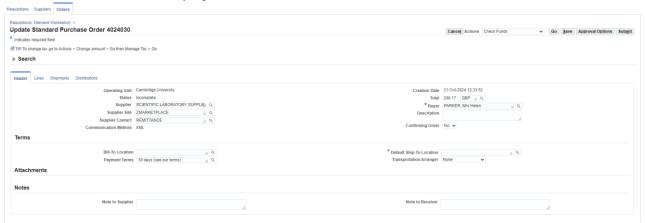
It is important to check that the **Supplier** and **Site** fields populate. If they don't that indicates that items from different suppliers have been created into the same order. Follow steps on page 5 to correct this error.

5. Click on Create



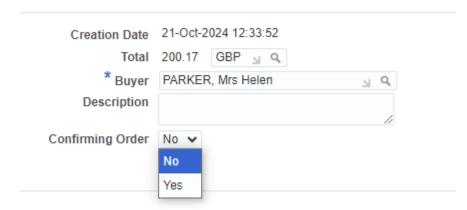


6. The **Orders** tab now displays, with the order number.

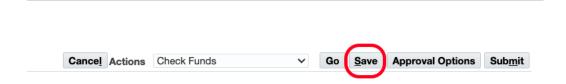


7. From the above screen:

- 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)



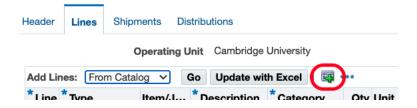
8. Review

- 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



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.

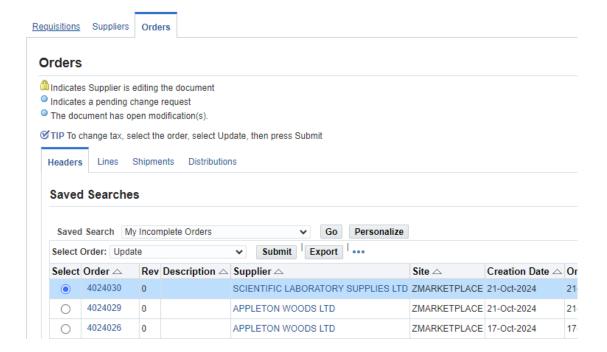


Adding a requisition line to an unapproved purchase order

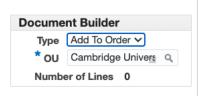
If you have an <u>unapproved order</u>, you can add requisition lines to the same supplier, supplier site order throughout the day, therefore submitting only one order.



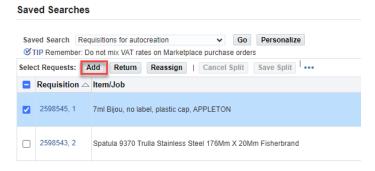
First thing to do is find the Order number you are adding the requisition line to.



- 2. The order will be listed as **Incomplete.** Make note of the number and click the **Requisitions** tab so that the Requisitions for Autocreation 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**.

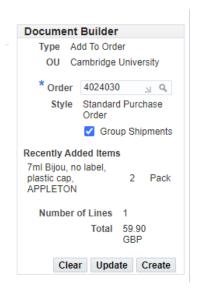


4. Select the lines and click Add.





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



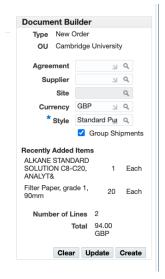
- 6. Click Create.
- 7. The order will open and to view this you would simply click on the Lines tab and Submit





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

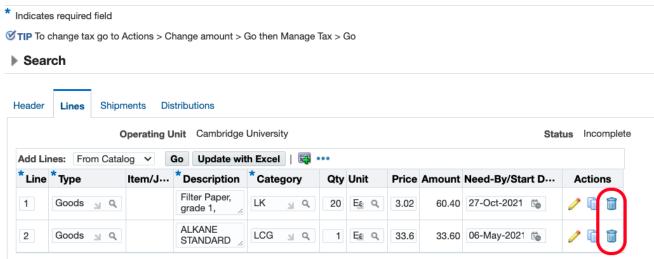
If the lines have already been created into an incomplete order, all lines will need to be returned to the requisition pool.

- 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?'.

Orders

Requisitions: Demand Workbench >

Update Standard Purchase Order 3414951



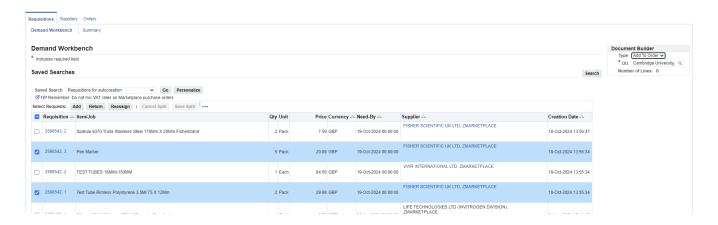
 Click Yes and the Lines tab will display with the remaining lines. Repeat the steps to delete the remaining lines.



- 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
 - o Bill-To Location
 - o 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.

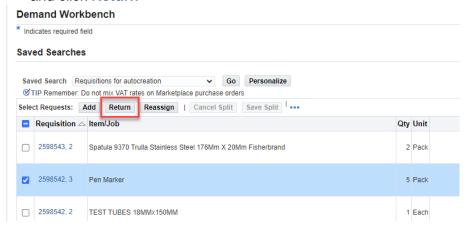


However, please <u>be aware</u> that if you are returning a requisition then it will return all lines from the requisition not just the one you have selected, unless the other lines have already been created into a purchase order.

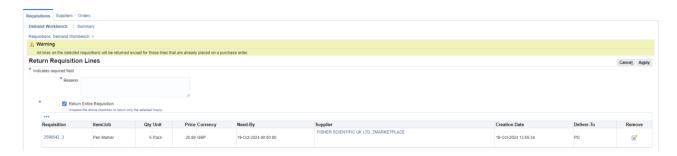
Responsibility iProcurement Buyer

Navigate Buyers Work Centre > Requisitions

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



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



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.