



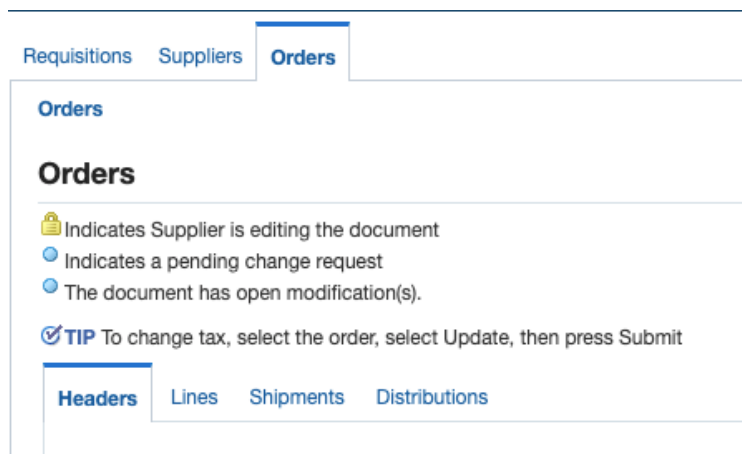
The Buyers Work Centre: Searching

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.



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**.

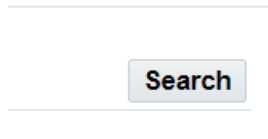


Searching

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. Select **Search** on the right hand side of the screen.



2. Select whether you wish to show data when all or any conditions of your search are met.

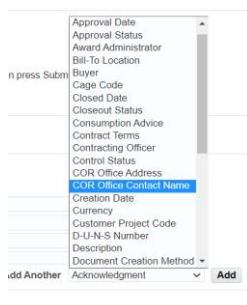
Order is the purchase order number.

3. Enter the criteria you wish to search or use the drop down lists to select (the four fields 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** 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.

Requisitions Suppliers **Orders**

Orders

Orders: Orders >

Standard Purchase Order 3414949 Actions Manage Order Notes Go Update

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

Search

Header Lines Shipments Distributions

Operating Unit	Cambridge University	Creation Date	20-Oct-2021 14:31:11
Status	Approved, Reserved	Total	20.89 GBP
Supplier	FISHER SCIENTIFIC UK LTD	Buyer	PARKER, Mrs Helen
Supplier Site	ZMARKETPLACE	Description	
Supplier Contact		Confirming Order	No
Communication Method	XML		

Terms

Bill-To Location	PD	Default Ship-To Location	PD
Payment Terms	30 days (see our terms)	Transportation Arranger	

Attachments

Notes

Note to Supplier Note to Receiver

Return to Orders: Orders

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**.

Actions

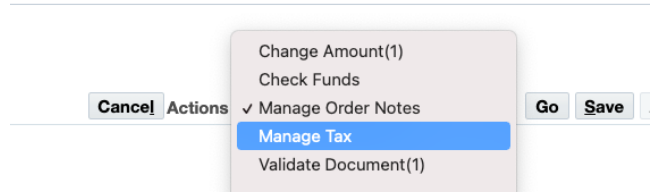
- ✓ Manage Order Notes
- View Tax
-
- View Acknowledgments
- View Acquisition Cost
- View Action History
- View Approval Work Flow
- View Change History
- View Invoices
- View Payments
- View Receipts
- View Requisitions
- View Revision History
-
- Update with Excel
- View Excel Import Status

Go Update



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 the arrow for the relevant item line or click on **Additional Tax Information**.

Orders

Orders: Orders > Update Standard Purchase Order >

Tax: Standard Purchase Order 3414949

Additional Tax Information

Operating Unit	Cambridge University	Currency	GBP
Supplier	FISHER SCIENTIFIC UK LTD	Amount	20.89
Supplier Site	ZMARKETPLACE	Nonrecoverable Tax	4.18
Buyer	PARKER, Mrs Helen	Recoverable Tax	0.00
Order Description		Total Tax	4.18
		Approval Amount	25.07

Search

Line

Schedule

Description

Location

Schedules

Distributions

Shipments

...

Details	Li...	Sch...	Descripti...	Locati...	Amount	Nonrecoverable T...	Recoverable T...	Total T...
	1	1	Pen Marker	PD	20.89	4.18	0.00	4.18



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 **Suppliers** Orders

Supplier Search

Simple 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 Tax Registration Number

Supplier Number D-U-N-S Number

Taxpayer ID Employee Number

[Show More Options](#)

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 Purchase Order Hold All New Orders

Supplier Number Hold from Payment All Invoices

Alternate Supplier Name Unmatched Invoices

Registry ID Unvalidated Invoices

Inactive Date

Alias

Supplier Sites

Site Status Site Name Operating Unit

[Key Purchasing Setups](#) [Key Payment Setups](#)

Site Name	Operating Unit	Ship-To Location	Bill-To Location	Creation Date	Created By	Last Update Date	Last Updated By	Ship Via	Pay On	Alternate Pay Site	Invoice Summary Level	Creat
NORMAN WAY	Cambridge University			11-May-2018	LC726	25-Jul-2019	CAS235					
NUFFIELD ROAD	Cambridge University			13-Jul-2000	INTERFACE	25-Jul-2019	CAS235					

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**.

Requisitions Suppliers Orders

Demand Workbench Summary

Demand Workbench

* Indicates required field

Saved Searches

Saved Search Requisitions for autocreation Go

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

Select Requests: Add Return Reassign | Cancel Split

OU Requisition Item/Job

If you just want to search requisitions, select **Search** from right hand side of the screen

2. This will display **Search parameters**.

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

Assignment Number

Assisting Office Address

Assisting Office Contact Name

Buyer

Category

Currency

Customer Project Code

Destination Subinventory

Document

Document Type

Emergency PO

Foreign Currency

Global

Import Source

Issuing Office

Item

Item Description

Item Revision

Job

Line Amount

Assignment Number Add