

## PO Entry: Entering Standard PO Lines

In this learning cycle, the PO Department Buyer will learn how to enter the SIU Purchase Order Line information. Assuming entry of the Header information is complete; this document continues entry of the PO, at the Lines region. Some of the Line information will already be entered by the system, some of the fields require data be entered by the PO Department Buyer, while some of the fields can be left blank.

Specifically, you will learn how to:

- Find unknown Item numbers.
  - Change the Description using the Editor window.
  - Enter Quantity and Price
    - How the Contractual Service type impacts changes to the Quantity and Price fields.
  - Enter the Lines DFF.
- To begin entering a Standard Purchase Order, login to AIS Production.
  - From your AIS Personal Home Page, select the Responsibility:
    - **SIU PO Department Buyer**
    - Then select **Purchase Orders > Purchase Orders**.
  - When the DFF in the Header Region is populated and the window closed, the cursor automatically advances to the first record in the Lines Region and readies it for data entry.

## Num and Type Fields

- The **Num** and **Type** fields are already populated.
  - Num indicates the number of the Line item and is automatically entered by the system.
  - The Type field defaults with Goods, which is the most commonly used Type. However, it could be changed to Contractual Services, depending on what is being purchased.

## Item Field

- The next field in the Lines region is **Item**. The Item number identifies the goods to be purchased.
- When the Item number is known, you can click in the field, enter it and press Tab.
  - When the Item field populates, the Category and Description fields automatically populate.
  - The Item field at the bottom of the multi-record block populates too.
- When the Item number is unknown, click in the Item field and invoke the LOV.
- An intermediate window displays prompting you to "Enter Reduction Criteria for the Long-List"
- Enter the Percent (%) wildcard in the Item field and click OK.
  - A Caution window displays advising you that "The System Items list is very large and could take a long time to retrieve." Click **OK**.
- The **System Items** window opens.
- Remove the zeros in the Find field and then enter what you want to find, e.g., **%books%**.
- Click **Find** to execute the search.
  - This will retrieve a list of values containing the word you entered, anywhere in the description.
- By reviewing the Description column, you can quickly locate the Item number and select it.
- Click **OK**.
- The Item and associated fields are populated.

**REMINDER:** Don't forget to use the wildcard character **%** at the beginning and the end of the word/s you type in the Find field.

### Description Field

The Description field populates based on the Item entered. In some instances, the Description provided by the system may not be specific enough for you. If necessary, you can use the Editor Window to add more detail and accurately identify the item being purchased.

- Tab once to advance to the **Description** field.
- Click **Edit** menu → **Edit Field**.
- The Editor window opens.
- Delete the current description and enter one more specific to the order.
- Click **OK**.

**IMPORTANT:** The Description field holds up to 240 characters. If more space is needed for the description, an Attachment to the Lines may be added. An Attachment may only be added after the Purchase Order has been saved. The instructions for adding an Attachment will be covered in another Learning Cycle in this module.

### UOM Field

- The next field in the Line Region is the UOM (Unit of Measurement) field. The default for this field is **Each**.
- If a different UOM is needed, tab to the field, invoke the LOV and change accordingly.

### Quantity & Price Fields

- Tab to the Quantity field.
- The **Quantity** is the total number of units ordered. The default for this field is '0'. The number should reflect the exact number of items needed.
- Enter the correct Quantity.
- Tab to the **Price** field.
  - The dollar amount **for each** unit is entered.
- Enter the dollar amount for each unit, e.g., '20' for \$20.00 and press Tab.
- When you press tab, the **Total** field in the Header Region automatically populates.

**Special Note on Quantity and Price:** There are exceptions to the rules regarding the Quantity and Price. When the "Type" is Contractual Services, the Quantity becomes the Total and Price will always be \$1.00.

### Need-By Field

- Although not required, you can populate the Need By field.
- Use Oracle date format, DD-MMM-YYYY.
  - You may invoke the LOV to bring up the calendar feature.

### PO Lines Descriptive FlexField (DFF)

- Tab to or click in the **Lines DFF**; the PO Lines DFF window opens.
- The **Document Type** field is already populated; the only required field is **PREPARER PHONE NO**.
  - Enter your phone number.
- The required entries for the PO Lines DFF window are complete; click **OK** to close the window.
- Data entry of the PO Lines region is now complete.