Purchase Order Summary: Finding Purchase Order Summary Information

- Depending upon your assigned job responsibilities in AIS, one of your tasks may be to look up detailed information on a Standard or Planned Purchase Order (PPO), specifically in these four major areas:
    - Purchase Order Header
        - Review the status
        - Verify a supplier's name
        - Show expiration date of a PPO
        - Determine remaining amount of a PPO
    - Purchase Order Line(s)
    - Purchase Order Shipment(s)
        - Look up the Matching Type and Receipt Routing
    - Purchase Order Distributions(s)

- The Find Purchase Orders window is used to search for existing Purchase Orders, using various criteria. The results are displayed in the Purchase Order Summary windows.

- Several responsibilities have access to the Purchase Order Summary functionality. The Department End User responsibilities are:
    - SIU Department Receiver
    - SIU Department Buyer
    - SIU PO Department Buyer

- For all responsibilities, you will begin by selecting the '**Purchase Order Summary**' Navigator function.
    - This opens the Find Purchase Orders window.

Find Purchase Orders Window - Significant Features

- Depending on the responsibility selected, some functions may not be available.
    - One of the first features that you may notice is the buttons on the various windows. Not all buttons are active for all responsibilities. If a button is inactive, it will be grayed out.
    - For example, neither the **New Release** nor **New PO** button is available to the SIU Department Receiver.
    - The New PO button is available only to buyers authorized to enter Purchase Orders (SIU PO Department Buyers at the SOM & the Purchasing Buyers in the Central Business Offices).

- Another feature is the **Results** Region. The radio button that you select determines how the information is displayed:
    - By Headers (the default choice)
    - By Lines
    - By Shipments
    - By Distributions

- You can use any of the fields on this window in combination with any other fields to fine-tune your search.

- The tabbed regions contain additional fields of information that combined together with the Supplier Name will help to limit the results of your search.

Keep this in Mind: Clicking **Find**, when this window is blank, is considered a Blind Find. It retrieves all PO's in the system, tying up system resources and slowing response time. *A Blind Find is not recommended.*

Searching by Purchase Order Number

- The quickest and most common way to retrieve purchase order information is to search by Purchase Order Number.
    - When the Find Purchase Orders window opens, the cursor automatically rests in the **Number** field. To begin this search, enter the Purchase Order Number in this field.
    - Accept the default "Headers" in the Results region or click the radio button to select another option.

- Click **Find** to execute the search and open the Purchase Order Headers summary window.

- When "Header" is selected in the Results region of the Find Purchase Orders window, the Purchase Order Headers summary window displays the results of the query.
  - There are four Summary windows:
    - Purchase Order Headers
    - Purchase Order Lines
    - Purchase Order Shipments
    - Purchase Order Distributions
  - These windows correspond to the Results region options on the Find Purchase Orders window.

Note: This is a Folder function window. The fields displayed on this window may be organized differently, if you use a custom folder (Refer to Unit 2: Navigation, Module 7: Folders for more information on Folder Tools)

- Use the **Horizontal Scroll Bar** at the bottom of the window to view additional fields.
  - Moving the scroll bar to the right, the **Approval Status** is available for your review.
  - Scrolling to the far right, brings the **PO Header Descriptive FlexField (DFF)** - [ ] into view.
    - Click in the Descriptive Flexfield to open it.
    - The PO Headers DFF displays the information entered by the purchasing buyer, when the PO was created.
    - Click 'OK' to close the DFF.
  - You can also see the **Amount** of the PO, the **Matched Amount** to invoices, **Buyer's** name, **Closure Status** and **Cancelled** status of the PO.

Purchase Order Lines

- From the PO Headers summary window, you can drill-down to the other summary windows.

- Click the **Lines** button to open the **Purchase Order Lines** summary window.
  - Use this window to view the information related to all lines on the PO.
  - Again, you can use the scroll bar to see more fields on this window.
  - Scroll to the end of the record and click in the **DFF**. The PO Lines DFF opens for review.
    - Remember, this information was entered by the Buyer at the time the purchase order was created.
    - Click 'OK' to close the DFF.

Purchase Order Shipments

- To drill-down to the **Purchase Order Shipments** summary window, click '**Shipments**'.

- The Purchase Order Shipments summary window opens to display information related to the shipments for the specific line on the PO, where our cursor was located when we clicked the shipment button.

- With more than 20 possible default fields, the Purchase Order Shipments summary window contains the most detail for a purchase order.

- Only a small number of the default fields are seen, initially, on this window. Fields, not among the default fields, can be accessed using Oracle's Folder Tools feature (e.g. **Match Type** and **Receipt Routing**).
  - Viewing the Match Type and Receipt Routing field information is important because Match Type tells you whether or not a Receipt will be required. Receipt Routing tells you who enters the Receipt - the department or Central Receiving.

- Use the Folder Tools icon on the Toolbar (or the Folder menu) to add the 'Match Type' and the 'Receipt Routing' fields to the Shipments window.
  - Position the cursor in the field that the field you insert will follow. (The field inserted will display to the right of where the cursor is placed.)
  - Click the Folder Tools icon to display the Folder Tools Palette, which allows you to perform most of the functions on the Folder menu with a single mouse click.
    - Click the **Show Field** icon. There are 84 fields available in the picklist.
    - If necessary, shorten the list by entering a portion of the field name, followed by % in the **Find** field.
    - Highlight the field you need; click **OK** to close the Show Field window.

- Close the Folder Tools by clicking the "X" in the upper right corner of the palette.

- Additional fields that can be displayed on the Shipments window, using Folder Tools, are the **Effective Date** and **Expires On** fields. A Planned PO will have information listed in these fields, if the Buyer enters it, when the order is created.
  - This would be important because you cannot enter a Release on a PPO, if the order has expired. There will be more on Releases in another learning cycle.
  - On a Standard PO, the "Effective Date" and "Expires On" fields are blank.

NOTE: When you close the PO summary windows, the fields added will be hidden again. To show these fields each time you open the PO Shipments summary window, you need to create a custom folder. These instructions are in Unit 2: Navigation, Module 7: Folders.

Purchase Order Distributions

- From the Purchase Order Shipments window, we can use the **Distributions** button to drill-down to the **Purchase Order Distributions** summary window.
  - This will show us the distributions for the selected shipment.

- Look in the **Distribution** field to view the number of distributions for the PO.
  - If a PO has multiple distributions, additional records will be shown.
  - The Distribution column will display the appropriate distribution number.

- Scroll to the right to view the **Charge Account** field.
  - To display the field contents in a format that is more legible, the Edit Field feature can be used.
    - Click in the Charge Account field and then, select the 'Edit' icon on the Toolbar to open the Editor tool.
    - Or, use the menu path: Edit > Edit Field.
  - The Accounting Flexfield window displays all the segments of the Charge Account.
  - When viewing is complete, click 'OK' to close the Accounting Flexfield window.

- Continue scrolling to the right to view the remaining fields.

- After scrolling to the end of the record, click in the DFF to view its contents.
  - The PO Distributions DFF window displays the information entered by the Buyer, when the PO was created.
  - To close this window, click 'OK'.

- When review of the summary information for the Purchase Order is complete, click the "Close Form" icon to return to the Navigator.

Summary

- Using the instructions above to:
  - Search for an existing Purchase Order (PO), using the Purchase Order Number, the quickest and most common search method.
  - Look up detailed information on a Standard or Planned Purchase Order in these four major areas.
    - Purchase Order Header:
      - Review status
      - Verify Supplier's name
    - Purchase Order Line(s)
    - Purchase Order Shipment(s):
      - Look up the Matching Type and Receipt Routing
      - Verify the Effective Date and Expiration Date on a PPO
    - Purchase Order Distribution(s):
      - Display and view the Charge Account