

PO Change History: Detail & Comparison of Revised POs

Overview

- This document provides instructions to locate a Purchase Order using Oracle's web-based application for PO Change History. Tips for reviewing the information returned by the search and how to compare and analyze the selected Purchase Order(s) are noted. Some advanced search features for this function are also addressed.
- Oracle's **PO Change History** function provides a powerful way to review and analyze Purchase Orders. It allows users to view, in detail, Purchase Orders that have been altered.
- The **Purchase Order Summary** function offers users several menu choices to "View Action History", "View Lines", "View Shipments", etc. for a specific Purchase Order. The **PO Change History** function allows you to view all this information at once, as well as review multiple Purchase Orders at one time, view revisions and compare previous versions.

Note: You may use the steps listed in this document to help you with your everyday job functions.

Navigation

- To begin the process, login to your Oracle Personal Home Page and select:
 - The **SIU PO Department Buyer** responsibility from your Main Menu.
 - Then, select **Purchase Orders > PO Change History** function.
- The **Purchase Order Revision History** web page appears.

Purchase Order Revision History - Simple Search Region

- The fields in the **Simple Search** region are used to enter selection criteria for the needed Purchase Order.
- Clicking the **Go** button, directly under the fields, executes the search.
- The queried results are displayed in the **record block** at the bottom of the window.
- To begin a Simple Search, you will enter search criteria, following the instructions above the search fields: "enter **Operating Unit AND at least one of the following search criteria: PO Number, Supplier**."
- The Operating Unit field only has one option, *SIU Operating Unit*. You can manually type that option in the field, or you can enter a partial value and press tab to auto populate the field.
- Then, populate either the PO Number or Supplier field.
 - Enter a portion of the **PO Number** or **Supplier** name and press Tab to select an option from a picklist.
 - Or, click the Magnifying Glass icon to the right of the field to activate the Search and Select window to populate the field.
 - If necessary, you can enter additional search criteria using one or more of the remaining fields.
- Click **Go** to execute the search.

Viewing Search Results

- Information about the queried PO is displayed in the appropriate fields at the bottom of the web page.
- The **Rev** (Revision) field should contain a number; this is the number of times the PO has been changed.
- Access **Compare to Original PO** to view the original PO information and compare it to the Revisions.
- Accessing **Compare to Previous PO** might show you a similar order from a previous month or year.
- **Show all PO Changes** view is probably the most used because it provides detail about all changes made from the time the original Purchase Order was issued, up to the current date.

PO Comparison Result Window

- Since the **Show all PO Changes** view seems to be the most popular, we will detail some of the features.
- Clicking the **Show all PO Changes** icon opens the **PO Comparison Result** window.
 - The buttons on the top right of the window allow you to access and compare the PO Change information.
 - Most of the information displayed at the top of the PO Comparison Result page defaults from the Header section of the Purchase Order.
 - On the bottom half of the page is the Show All PO Changes section. It provides detail about each change for the queried Purchase Order.
 - The **Print Document Revisions** region is not enabled for SIU.
- When the review is complete, click the breadcrumb link at the top of the page, or the corresponding link in the left corner of the window to return to the Purchase Order Revision History window.

Other Search Techniques

- If only a portion of the PO number is known, the Purchase Order Revision History window allows the use of **wildcard** characters to perform queries. Let's say you're not certain of the PO# you want to query, but know it begins with '709'.
- Begin by entering 709% (or part of the number you are looking for) in the PO Number field and then click **Go**.
- At the bottom of the window, a listing of all purchase orders beginning with 709 is returned.
 - Use the scroll bars to locate and view all the available information for this page.
 - Located in the upper and lower right corner of the record block, are **Previous** and **Next** links that you can use to advance through the pages.
- When the review is complete, use the Vertical Scroll Bar or another means to return to the top of the window.
- At this point, you can end the session or perform another search.
 - To end the session, click one of the **Logout** links on this window.
- If you choose to begin another search, be sure to remove the previous search criteria by clicking the **Clear** button in the Simple Search region.
- To continue this demonstration, we will remove the previous search criteria so we can provide an overview of other search techniques available in this window.
- You may have noticed the **Flashlight** icons at the end of the **Document Type** and **Business Unit** fields. These icons are used to filter data for more specific searches.

Search and Select: Document Type window

- Click on the Flashlight for the Document Type field.
- The Search and Select: Document Type window appears.
- If you know the document type you are searching for, you can type in the first few letters of the document type and press tab, e.g. St for Standard Purchase Orders.
- However, for now enter the % wildcard in the text field, for demonstration purposes. This will allow you to see all of the Document Types available.
- Click **Go**.

Note: The **Search By** field has only Type Name available.

- The information displays in the **Results** region.
- Notice the **Type Name** column in the Results region. In previous versions of Oracle, you were unable to view Planned Purchase Orders or Planned (Scheduled) Releases through the PO Change History feature.

- There are two ways you can retrieve the Type document you want.
 - You can use the **Quick Select** icon.
 - Or, you can activate the **radio button** and **click** the **Select** button.
- Use whichever method you prefer; the Document Type field populates with your selection.
- Click the **Go** button to execute the query.
- As the new query processes, you may get a **Warning** in the top left corner of the window.
 - The Warning is telling you that your search request is quite large and advises you to restrict your query.
- If you receive that warning, you will need to do an **Advanced Search**.

Advanced Search

- Click the **Advanced Search** button in the right corner of the window.
 - This feature offers more options for minimizing search results.
- An Advanced Search region appears with a set of fields you can use to specify parameters and values, in order to filter data.
- For demonstration purposes, begin by clicking the down arrow for the PO Number field.
 - A drop down menu provides the available filtering options.
- Select **ends with**.
- You also have the option of specifying whether the search results can **contain any value or all values entered**; all values entered is the default.
- Change the default and retrieve search criteria that **contain any value entered**.
- In addition, we want to search for all PO Numbers ending with 93; **enter 93** in the second PO Number field.
- Click **Go**.
- Purchasing information for all PO Numbers ending with 93 is displayed.
- Remember to use the Vertical Scroll Bar and the 'Previous/Next' icons to view records, if needed.
- You can sort various columns in ascending or descending order, by clicking on the column heading.
- After clicking a column heading, an arrow will appear in the field showing you that the data is now sorted in Ascending Date order. To change the sort to descending order, click the arrow.
- Only a few features of Oracle's Purchase Order Revision History function have been demonstrated.
- As time allows, practice using the different search techniques to become familiar with all the features this function has to offer.
- This completes the learning cycle.
- To return to the Navigator and access an application, click the **Home** link in the top right of your screen; or, to end the session, click the **Logout** link.