Southern Illinois University CARBONDALE

PO Summary: Additional Search Techniques

- Using the Find Purchase Orders window, you can locate purchase orders and releases for review in the Purchase Order Summary windows.

- In a previous Learning Cycle, you learned how to locate a specific purchase order using the purchase order Number field. This Learning Cycle focused on additional fields that can be used to broaden your search and/or enable you to locate POs based on search criteria other than the PO Number.

- The Purchase Order Summary function is used by several responsibilities to review aspects of Purchase Orders and Releases.
  - For demonstration purposes, the SIU Department Receiver responsibility is used.

- To begin, select the **Purchase Order Summary** function from the Navigator window.
  - This opens the **Find Purchase Orders** window.

Additional Search Techniques

- While the **Number** field is the most effective search criteria for locating a specific PO, you may find the need to view groups of POs or Releases.

- For these types of searches, you will use one or more fields together on the Find Purchase Orders window to create the search criteria.

Find Purchase Orders Window – Organization and Fields Defined

- The organization of this window and the uses of the various fields are defined below.

- The upper portion of the window is used to specify search criteria for information that is normally entered on most Purchase Orders.
  - The **Number** field is where the PO Number is entered.
  - When the PO is a Planned Purchase Order, you can enter the **Release** number to specify a specific release.
  - The **Type** field can be used to identify the PO Type. The options most commonly used at SIU are:

            Standard Purchase Order
            Planned Purchase Order
            Scheduled Release
        You can open up your search or limit it using the Type field, along with other criteria.

Note: When you select Scheduled Release as the type, the View Releases Checkbox automatically selects. You can optionally enter a PPO number and select the View Releases checkbox manually to see the PPO and all the associated Scheduled Releases.

  - The **Supplier** and/or **Site** fields can be used to locate all POs and Releases entered against the Supplier. These criteria alone can result in a large search. It is best to combine these fields with more limiting search criteria.

- Use the remainder of these fields to fine-tune your search.
  - The **Ship-To Org**, **Ship-To**, **Line**, and Shipment fields help you to identify specifics related to where the shipments were delivered and a specific delivery of a specific line on the PO.
  - The **Line** type will let you select the type of the order line. I.e. Goods or Services.
  - The **Buyer** field will search only for POs created by the designated Buyer's name.

- Use the tabbed regions located at the bottom of the window to help you limit your search even further.
  - The **Line** tab is the default - notice that you can enter an **Item**, **Category**, **Description**, and/or even the **Supplier Item** number to limit the search.
  - The **Date Ranges** tab allows you to enter ranges for:
    - **Order** "issue" dates   **Need By** dates
    - **Approval** dates   **Closed** dates
    - **Promised** dates
  - The **Status** tab provides fields to search for POs based on:
    - Order Approval status
    - Control status (Open, Cancelled or Closed)
    - Hold or Frozen status
    - Selecting a specific status will help to limit your search.
  - The **Related Documents** tab provides fields to search for POs based on the Receipt and Invoice numbers.
  - The **Deliver To** tab provides fields to limit your search to delivery related locations and organizations.
  - The **Accounting** tab will let you enter a Period range or GL Date range. It also lets you enter a specific Charge Account used on the PO and specify whether the PO has an active encumbrance.

- The **Results** region should be stressed again. The **Headers** option is the default, when this window opens. You can manually select the appropriate PO Summary window to open by selecting another option.
  - The default in the Results region may change automatically based on the fields of data you select as you enter search criteria. For example, if you enter an Item number, the option in the Results region will change to Lines.

Hint: Use the **Clear** button located at the bottom of the window to make sure any remaining search criteria from a prior search is removed.

Search by Supplier

- As you know the **Supplier** list is quite long.
  - Limit the search by entering a portion of the supplier's name and pressing the **Tab** key.
  - The Suppliers LOV's window displays all supplier names beginning with 'Kennedy B'.
  - Select a supplier name and click 'OK' to return to the Find Purchase Orders window.
  - The Supplier field is now populated.

- Completing only the "Supplier" field will return all POs for this supplier regardless of date, status or other criteria.

- The Results region "Header" option is the default. This region will return PO's on the Purchase Order Headers summary window.
  - A Department Buyer can choose 'Headers' to view PO Type, Order Date, Approval Status or $$ amount.
  - A Department Receiver could select 'Shipments' from the Results region and open the PO Shipments summary window to view Matching Type, Receipt Routing, Qty Received information, Promise or Need-By dates.

- Choose an option in the "Results" region and click the **Find** button.

- If the default "Headers' is chosen, the Purchase Order Headers summary window will display a listing of all purchase orders issued to the Supplier selected.
  - Locate and select the needed Purchase Order and drill down to view the Lines, Shipments and Distributions information.

- To close PO Headers summary window and return to the Find Purchase Orders window:
  - Use the **Oracle icon > Close** option.

- If you wish to perform another search, you will have to remove the prior search criteria from this window, unless you want to add to the original criteria, to limit the search results.

- Clicking the '**Clear**' button at the bottom of the window erases any previous search criteria and prepares the window for another search.

- If your search is complete, click the '**Close Form**' icon on the Toolbar to return to the Navigator window.

Search by Date Ranges

- Use the Date Ranges tabbed region to enter a range of dates to locate the purchase orders.

- To begin, click the **Date Ranges** tabbed region.
    - Notice only the fields in Tabbed Region at the bottom of the window changed; the top half of this window stayed the same, as well as the Results region.

- You can search on a variety of date ranges; the day the Order was issued, Approved, Promised, Need-By or Closed.

- Use the LOV to open the calendar or 'type' the date directly in the field.
    - You MUST use standard Oracle date format, DD-MMM-YYYY, when manually entering the dates.
        Using this search criteria, the results will display on the summary window specified in the Results region. It will include all POs "issued" between the dates shown.

- Accept the default **Result** option or choose another, and click **Find**.

- The results of the query for purchase orders issued during the 'date range' specified are displayed.
    - Locate and select the needed Purchase Order and drill down to view the Lines, Shipments and Distributions information.

- Click the 'Close Form' icon on the Toolbar to return to the Navigator window.

Search by Type

- Open the Find Purchase Orders window, if not already there.
    - From the Navigator window, highlight and double-click **Purchase Order Summary**.

- In this search, use the **Type** field to find the Purchase Orders you need.

- Begin by clicking in the Type field and invoking the LOV.
    - From the list of **Document Types**, Department Buyers, PO Department Buyers and Department Receivers will most often search for:
        Planned Purchase Order
        Standard Purchase Order
        Scheduled Release
    - Select a Document Type and click OK.

- The Type field populates with your selection.

CAUTION: Due to the number of Purchase Order's in the system, you should limit the search by entering additional search criteria.

- Clicking "Find" executes the search.

- The Purchase Orders Headers window displays the results.
    - Locate and select the needed Purchase Order and drill down to view the Lines, Shipments and Distributions information.

- Click the 'Close Form' icon on the Toolbar to return to the Navigator.

Search by Type and Line Type

- To search using both the "Type" and "Line Type" fields, populate the Type field as shown above, then click in the **Line Type** field and invoke the LOV.
    - The **Line Types** window displays.
    - The default for the Line Type, when the PO is entered, is "**Goods**".
        If, however, the default was changed to "Services" when the PO was entered and you know this, then you could select "Services" to narrow the search.
    - Select the correct **Line Type** and then click **OK**.
    - The Line Type field populates.

- In Production, if you choose to perform a search using these fields, it is recommended that you limit the search by entering additional search criteria.

- Notice that in the Results region, **Lines** is selected automatically.

- Click "**Find**" to execute the search.
    - During the retrieval time, usually when a large number of records match the search criteria entered, a **Cancel Query** window may display.
    - No action is needed unless you decide to "Cancel" the query; this window will automatically disappear, after a few seconds.

- The Purchase Order "Lines" window displays, listing only those Purchase Orders that match the PO Type and Line Type entered.

- Select a Purchase Order and drill down to view Shipments and Distributions.

- Select "Close Form" on the Toolbar to return to the Navigator window.