

PO Summary: Inquire Menu

- In AIS, the **Inquire Menu** is new. Most of the functions on this new menu were previously part of the "Special" Menu. The functions on the "Special" Menu were moved to the "Tools" Menu and this new "Inquire" Menu.
- The Inquire Menu has several PO Inquiry functions:
 - **View Headers**
 - **View Lines**
 - **View Shipments**
 - **View Distributions**
 - **View Action History**
 - **View Invoices**
 - **View Receipts**
- You learned how to access some of these functions through the buttons located on the PO Summary windows. However, they can also be accessed through the Inquire Menu.
- Department Buyers, Department Receivers and PO Department Buyers can use the Inquire Menu.
 - Differences between the responsibilities are noted.

Exploring the Inquire Menu Functions

- From the Navigator window, double-click the **Purchase Order Summary** function to open the **Find Purchase Orders** window.
- Enter search criteria (e.g., a Purchase Order Number).
- In the Results region, accept the default, "Headers" to specify which window to open.
- Then, click 'Find'.
- The Purchase Order Headers window displays the results of the criteria entered.
- The new "Inquire" menu is located on the menu bar. This menu is only available in the Purchasing windows.
 - It provides options for you to view various aspects of the Purchase Order, matched Invoices, Receipts entries, and approval actions.
- Depending on your responsibility and the window that you are viewing, the functions available on the Inquire menu will vary.
- For the SIU Department Receiver, the viewing options available on the Inquire menu for the Purchase Order Headers window are:
 - View Lines
 - View Shipments
 - View Distributions
 - View Action History
 - View Receipts
- If you are using an SIU Department Buyer or an SIU PO Department Buyer responsibility, you can also **View Invoices** that have been matched to the PO.

View Action History

- **View Action History (VAH)** is a record of all actions taken on a Purchase Order and/or a Release.
 - It shows when it was submitted, what action was taken and who performed the action.
 - VAH also tracks where the PO or Release document has been routed and may help determine where the document is when troubleshooting within the system.
- From the **Inquire Menu**, select **View Action History**.
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- Depending on the type of Purchase order, the title of the window opened will be display one of the following.
 - Standard Purchase Order
 - Planned Purchase Order
- The “Actions” taken on the PO are listed. The number of Actions will vary, depending on each of the POs.
- You can also see the date the action took place, the action taken and who performed the action.
- If the **Action** field is blank, the name of the person in the **Performed By** field indicates where the PO is waiting for the next action.
- The Actions take place in sequence (view 'Seq' field). For each Action taken, a line is automatically entered in the record.
- The first line entered occurs when the PO is submitted for approval for the first time; it is identified with '0'.
- To find out why an Action was taken, view the **Note** field.
- The Note field is populated by a buyer when he/she enters info into the Approval Document window, while preparing a PO or a Release.
- You may need to use the **Edit Field** function to view the entire note.
 - Click in the “Note” field to select it.
 - Then, click the “Edit Field” icon on the Toolbar.
You can also use the menu path: **Edit > Edit Field**.
 - The **Editor** window shows the entire note.
 - Click **'OK'** to close the Editor.
- To return to the Purchase Order Headers window, close the VAH window.
 - Click the red **Oracle icon** and **'Close'**.

View Receipts

- From the Inquire menu, select **View Receipts**.

Keep in mind: The **Organizations** window may or may not appear. It will depend on whether or not you have previously selected a Procurement Organization.

- If the Organizations window displays, select an Org and click OK.
- The **Receipt Headers Summary** window displays.
 - This window was discussed in a previous Learning Cycle.
- Click the **Current Record Indicator** to open the actual **Receipt Header** window.
- The “Receipt Header” window displays.
 - This window was used to create the receipt.
 - All the information entered, when the receipt was created, is displayed here.
 - Click the **Transactions** button.
The **Receiving Transaction Summary** window displays the transaction type information.
- Use the **Close Form** icon to return to the PO Header summary window.
- The remaining actions on the Inquire menu give the same results as clicking on the corresponding buttons on the forms. Use the Inquire menu as another means to drill down through the forms.
- This completes the review of the Inquire menu.
- Remember that if you have an SIU Department Buyer or SIU PO Department Buyer responsibility, you will also be able to “View Invoices” that are matched to the PO.
- Click the “Close Form” icon to return to the Navigator.