



Title:	Purchasing-Purchase Order Inquiry	Document ID: PO0010
Replaces:	Purchase Order Inquiry, PO400	Date Modified: 08/07/2014

Purpose: This procedure details how to perform a Purchase Order Inquiry in the Oracle Purchasing module. The *Find Purchase Orders* window allows you to query details of a purchase order including the following information:

- Approval date of the purchase order.
- Purchase Order details sent to supplier.
- Account distribution associated with each line item.
- Purchase Order status.

There are three methods to view Purchase Order information. Oracle Purchase Order Inquiry (this document) provides the ability to drilldown into Purchase Order Lines, Purchase Order Shipments, and Distributions (cost center/s charged). The OUPO Summary View is a web based system displaying Purchase Order Information in a table format with drilldown capability to view invoices associated with the Purchase Order, cost center, matched amount, and PO status by line (refer to the OUPO Summary View document). You can also view Purchase Order information using the BobcatBUY system (only purchases made using BobcatBUY). BobcatBUY displays requisition information, approval workflow information, dates the requisition was created, turned into a purchase order, purchase order was sent to the Supplier, the invoice was received and paid, and attachments of scanned paper invoices. View *BobcatBUY* training @ <http://www.ohio.edu/finance/procuretopay/procurement/bobcatbuy.cfm>.

For Questions Contact: Finance Customer Care at financecustomercare@ohio.edu or 740.597.6446.

ATTN: FOR TIPS ON NAVIGATION AND COMMONLY USED FIELDS ACCESS THE ORACLE NAVIGATION DOCUMENT.

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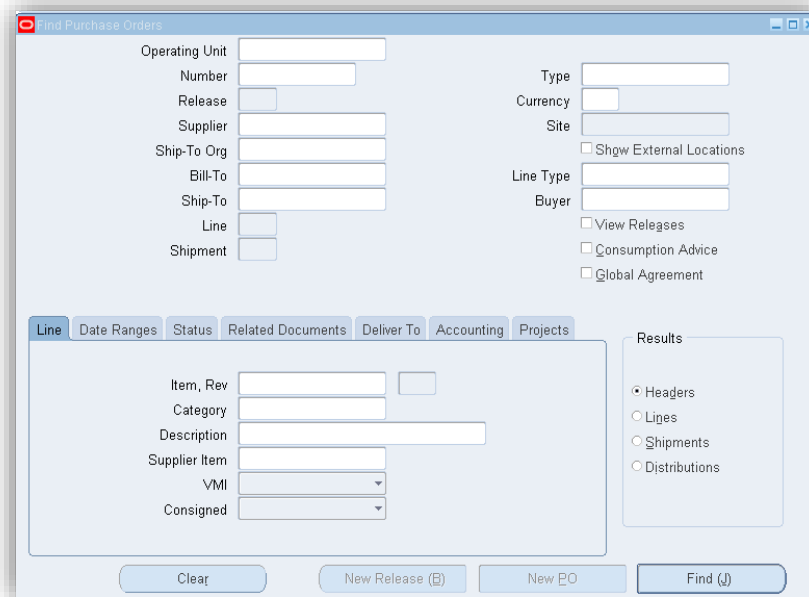
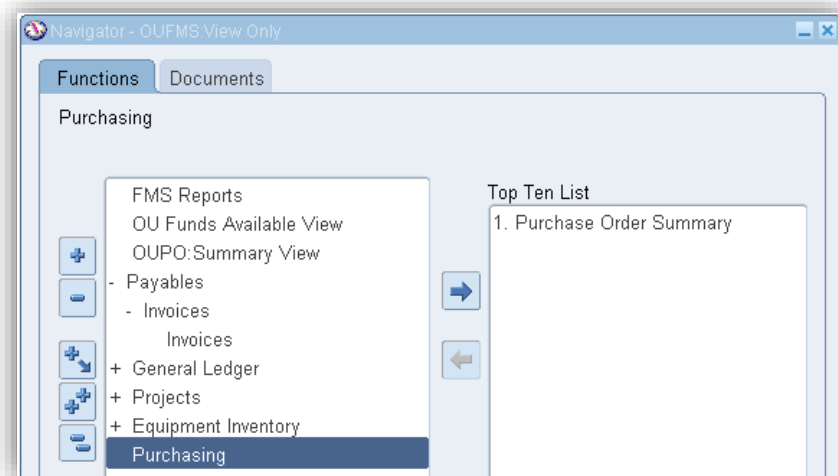
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NAVIGATE TO FIND PURCHASE ORDERS WINDOW

1. Click **Purchasing** link.
2. The *Find Purchase Orders* window and the *Navigator* window are displayed. The *Find Purchase Orders* window appears on top. To add the *Purchasing (Purchase Order Summary)* window to the Top Ten List, verify the Purchasing link is highlighted in blue, then click the **Add to List** button . Next time you want to access the *Find Purchase Orders* window, click on the *Purchase Order Summary* link in the Top Ten List.



ENTER SEARCH CRITERIA ON FIND PURCHASE ORDERS WINDOW

A purchase order search can be conducted from the *Find Purchase Orders* window. You can enter a variety of criteria, including date ranges, line information, purchase order status, related documents, accounting, etc.

ATTN: YOU MAY SEARCH BASED ON ANY OF THE SEARCH CRITERIA FIELDS INCLUDED ON THE FIND PURCHASE ORDERS WINDOW, INCLUDING THE TABBED SECTION AT THE BOTTOM. YOU ARE ABLE TO ENTER AS MANY CRITERIA AS YOU WANT TO NARROW THE SEARCH RESULTS. THE SEARCH CRITERIA FIELDS LISTED BELOW ARE THE FIELDS MOST COMMONLY USED.

Main Fields on Find Purchase Orders Window

The screenshot shows a window titled "Find Purchase Orders" with the following fields and options:

- Operating Unit: [Text Field]
- Number: [Text Field]
- Release: [Text Field]
- Supplier: [Text Field]
- Ship-To Org: [Text Field]
- Bill-To: [Text Field]
- Ship-To: [Text Field]
- Line: [Text Field]
- Shipment: [Text Field]
- Type: [Text Field]
- Currency: [Text Field]
- Site: [Text Field]
- Shgw External Locations
- Line Type: [Text Field]
- Buyer: [Text Field]
- View Releases
- Consumption Advice
- Global Agreement

1. *Operating Unit*: Enter **Ohio University Operations** (either key value or use LOV).
2. *Number*: Enter **purchase order number** (either key value or use LOV).
3. *Supplier*: Enter **name of Supplier** (either key value or use LOV).
4. *Ship-To*: Enter the **ship-to location** (either key value or use LOV).

Enter Search Criteria Using the Tabs

WARNING: THE OPERATING UNIT FIELD MUST BE ENTERED TO PRODUCE SEARCH RESULTS. OHIO UNIVERSITY OPERATIONS IS THE DEFAULT.

Line Tab

In the Line tab, OU only uses the *Category* field. Click in the *Category* field which is the designation for a commodity (either key value or use LOV).

Date Ranges Tab

In the *Date Ranges* tab, you may enter date/date ranges for: Order, Approved, and Closed.

Line	Date Ranges	Status	Related Documents	Deliver To	Accounting	Projects
	Order					
	Approved					
	Promised					
	Need-By					
	Closed					

1. Click in the appropriate *Date Range* fields and enter the **date** of the field description.
2. Press **Tab** to advance to the next field and enter **the same date** if you are looking for purchase orders on one date versus multiple dates.
3. You may also search within a date range. Enter **From/To dates** in both fields.

Status Tab

The *Status* tab allows you to limit the search by status. OU only uses the *Order Approval* status field, (e.g., an approved purchase order). Of the choices listed, **Rejected** is not used.

Line	Date Ranges	Status	Related Documents	Deliver To	Accounting	Projects
	Order Approval	Approved				
	Control					
	Hold					
	Frozen					
	Firmed					

- Approved
- In Process
- Incomplete
- Pre-Approved
- Rejected
- Requires Reapproval

1. Click the **dropdown arrow** in *Order Approval* field
2. Click the **appropriate status option** (Approved, In Process, Incomplete, Pre-Approved, or Requires Reapproval).

Deliver To Tab

In the Deliver To tab, you may limit the search by Requester or Location (other fields not used).

1. Requester: Enter the **Requester's** name (key value or use the LOV).
2. Location: Enter the **Location** name (key value or use the LOV).

Accounting Tab

In the *Accounting* tab, you can limit the search by Period, GL Date, Charge Account, and whether there are Active Encumbrances. **Use the *Charge Account* field when entering the account string. The *Budget Account* string should match the *Charge Account* string.**

1. Period: Enter the (from) **Period** and (to) **Period** (key value or use the LOV). Both the (from/to) GL date is populated based on the periods selected.
2. Charge Account: Enter the **Account Code Charged** (key value or use the LOV).
3. Budget Account: Enter the budget account for the purchase order/s (key value or use the LOV).
4. Active Encumbrances: Click the **LOV** icon. Click on **Yes** or **No** option.

Projects Tab

In the *Projects* tab, you can limit the search by Project and/or Task number.

1. Project: Enter the project number (key value or use the LOV).
2. Task: Enter the **Task** number if one is associated with the project (key value or use the LOV).

Results Section

Click the Results radio button (Headers, Lines, Shipments, or Distributions) to display the desired results. Depending on the purchase order all summary windows may not be available. If you choose header you will be able to drilldown into the lines, shipments, and distributions.

ATTN: CLICK THE HEADERS RADIO BUTTON AND THE PURCHASE ORDER HEADERS WINDOW DISPLAYS.

CLICK THE LINES RADIO BUTTON AND THE PURCHASE ORDER LINES WINDOW DISPLAYS.

CLICK THE SHIPMENTS RADIO BUTTON AND THE PURCHASE ORDER SHIPMENTS WINDOW DISPLAYS.

CLICK THE DISTRIBUTIONS RADIO BUTTON AND THE PURCHASE ORDER DISTRIBUTIONS WINDOW DISPLAYS.

THIS WILL SAVE YOU TIME IF YOU WANT TO VIEW ALL FOUR WINDOWS ANYWAY.


Find Button

After search criteria has been entered, click the **Find** button. Depending on which *Results* option you chose, one of four windows may display; Purchase Order Headers, Purchase Order Shipments, Purchase Order Lines, or Purchase Order Distributions. The search criteria entered may influence which results are displayed.

Clear Button

Click the **Clear** button to clear all search criteria and start a new search.

Return to Find Purchase Orders Window

If you want to start a new search or modify your existing search return to the *Find Purchase Orders* window. Click the **Find** icon . The *Find Purchase Orders* window displays.




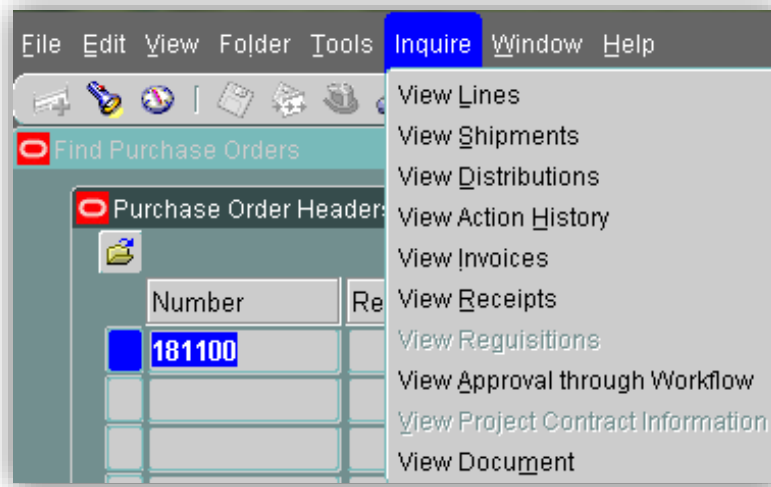
VIEW PURCHASE ORDER HEADERS WINDOW

Use the Purchase Order Headers window to view purchase order header information. You can also drill down to view purchase order line information from this window.



1. Click the purchase order to drilldown into Lines.
2. Click the **Lines** button to display PO Lines screen or from this window you can directly access the next three Purchase Order windows, instead of drilling down through the screens. You can view the *Purchase Order Lines*, *Purchase Order Shipments*, and *Purchase Order Distributions* windows.
3. Click on the **Purchase Order** number/row.
4. Click on **Inquire** from the Toolbar menu.
5. Scroll down and click on **the appropriate window** to display.

Field	Description of fields used by OU
<i>Number</i>	Purchase Order Number.
<i>Description</i>	Description on purchase order.
<i>Approval Status</i>	The Approval Status of the purchase order (Approved, Cancelled, etc.)
<i>Order Date</i>	The date the order was created in Oracle.
<i>Supplier</i>	The supplier listed on the purchase order.
<i>Supplier Site</i>	The supplier site.
<i>Amount</i>	The purchase order total.
<i>Matched Amount</i>	The matched amount is the invoiced amount.
<i>Buyer</i>	The Procure-To-Pay department Buyer name.
<i>Closure Status</i>	The closure status of the purchase order.
<i>Cancelled</i>	Checkbox means the purchase order is cancelled.
 <i>PO Headers window</i>	This is a Descriptive Flexfield (DFF) that includes the following fields: <i>PO Prefix, Ship to Attention, Price Confirmed By, Confirmed By Contract, PO Indicator, PO Attachment, Prevailing Wage, and Date RQ Received.</i> Note: See Oracle Navigation document for more details on DFF.



View Action History from the Purchase Order Headers Window

View any actions or edits performed on the purchase order.

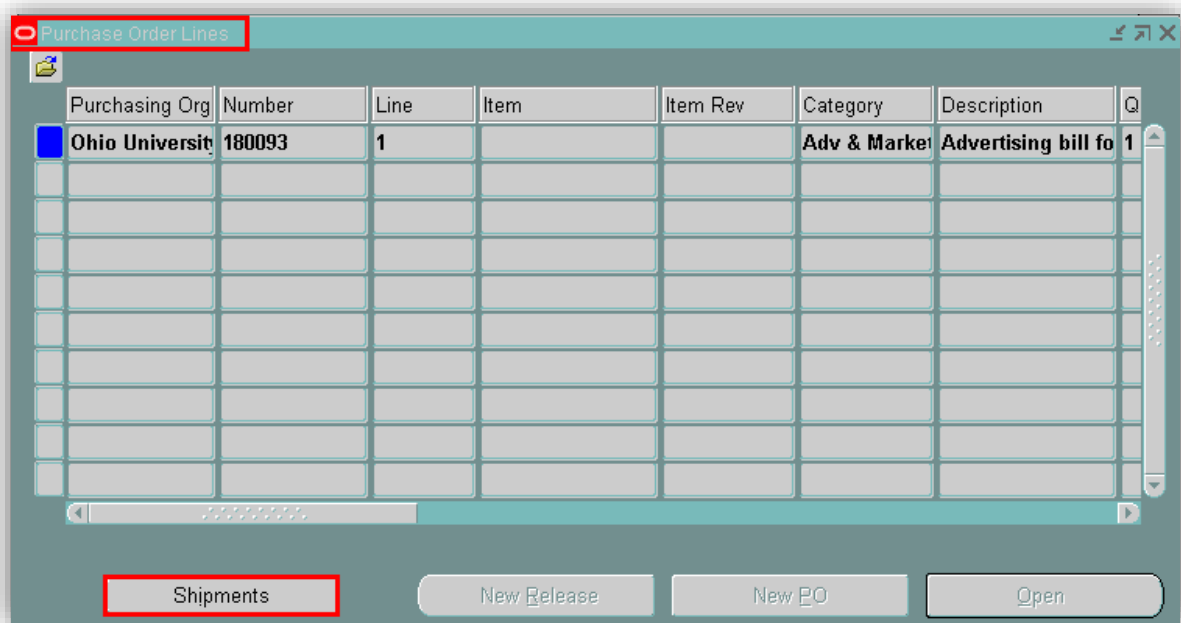
1. Click on the **Purchase Order** number/row.
2. Click on **Inquire** from the Toolbar menu.
3. Scroll down and click on **View Action History**. The Standard Purchase Order window is displayed showing PO approval activity.

The screenshot shows a window titled 'Standard Purchase Order - 181100'. It contains a table with the following data:

Seq	Date	Rev	Action	Performed By	Note
1	25-JUN-2014 09:38	0	Close	Bobcat, Jane	
0	08-APR-2014 16:50	0	Reserve	Bobcat, Joe	

VIEW PURCHASE ORDER LINES WINDOW

Use the Purchase Order Lines window to view purchase order line information. You can also drill down to view purchase order shipment information from this window.

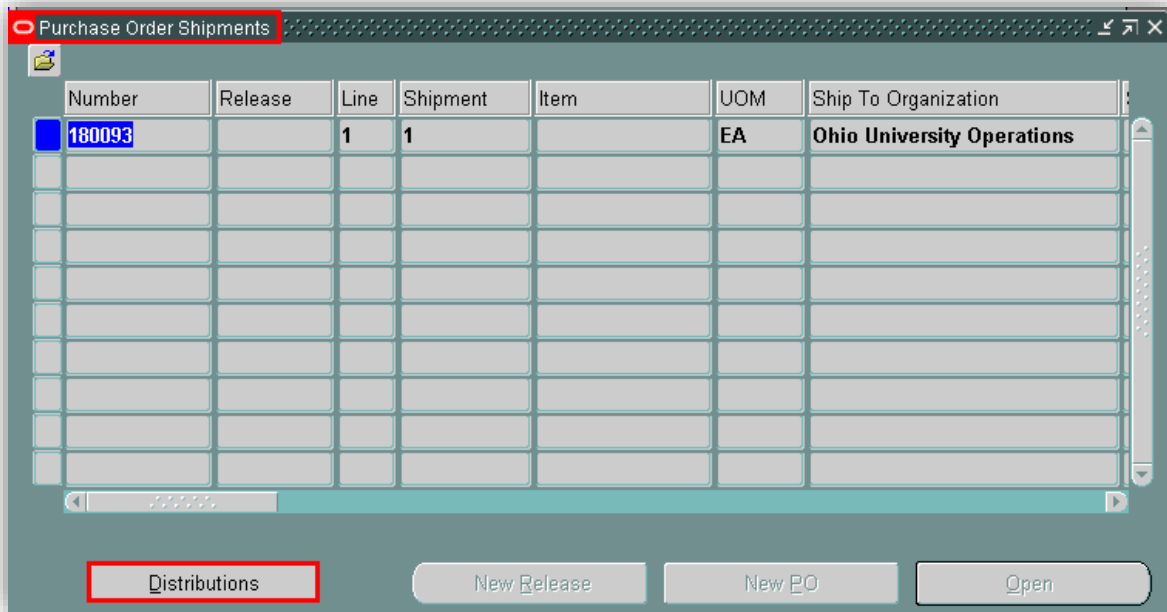


1. Click on the purchase order line to drilldown into shipment information.
2. Click **Shipments** button.

Field	Description of fields used by OU
<i>Number</i>	Purchase Order Number resulting from query.
<i>Line</i>	Line item number on the purchase order.
<i>Category</i>	Commodity code of goods/services.
<i>Description</i>	Description entered for the particular line item.
<i>Approval Status</i>	The Approval Status of the purchase order line (Approved, Cancelled, etc.)
<i>Quantity</i>	The quantity of the particular line item ordered.
<i>UOM</i>	The unit of measure for the line item ordered.
<i>Price</i>	The unit price of the line item.
<i>Amount</i>	The unit price times the quantity.
<i>Buyer</i>	The Procure-To-Pay department Buyer name.
<i>Cancelled</i>	Checkbox means the particular line item is cancelled.
<i>Closure Status</i>	The closure status of the line.
<i>Type</i>	A description of the line type.
<i>Supplier</i>	The supplier listed on the purchase order.
<i>Supplier Site</i>	The supplier site designation.

VIEW PURCHASE ORDER SHIPMENTS WINDOW

Use the Purchase Order Shipments window to view purchase order shipment information. You can also drill down to view purchase order distribution information from this window.

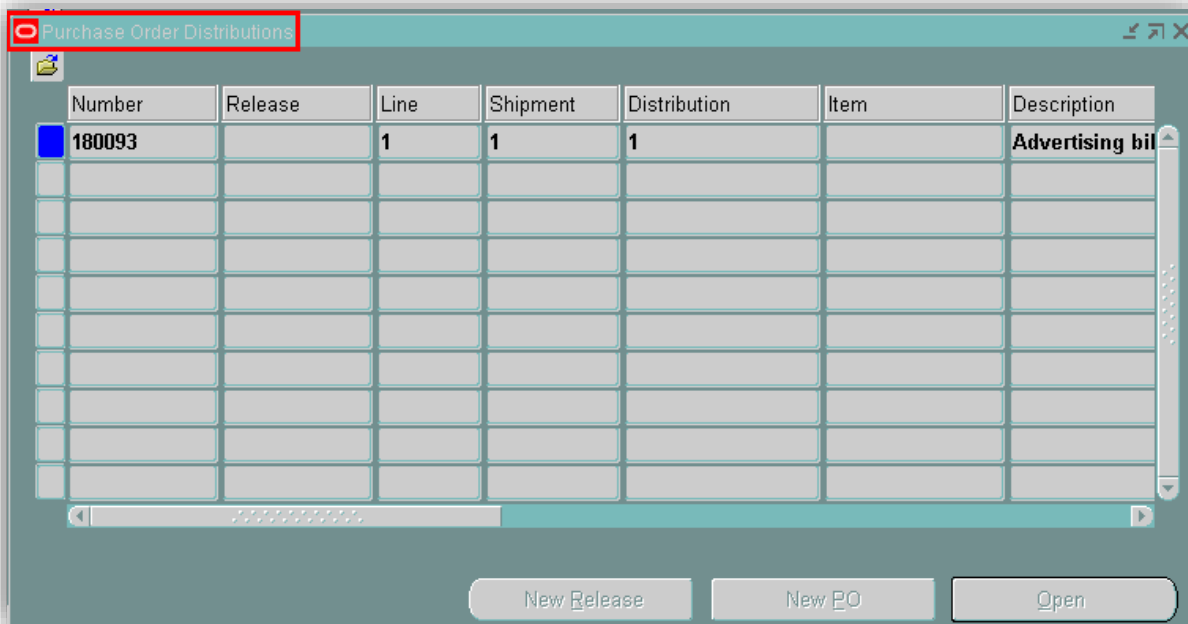



1. Click on the purchase order to drilldown into distribution information.
2. Click **Distributions** button.

Field	Description of fields used by OU
<i>Number</i>	Purchase Order Number resulting from query
<i>Release</i>	This field not used.
<i>Line</i>	Line item number on the purchase order
<i>Shipment/Item</i>	This field not used.
<i>UOM</i>	The unit of measure for the line item ordered
<i>Ship To Organization</i>	Default: Ohio University Operations
<i>Shipment Amount</i>	Dollar amount of the shipment
<i>Quantity fields</i>	Quantity of items, Quantity Due, Received, Accepted, Rejected, Billed, and Cancelled fields
<i>Supplier</i>	The supplier listed on the purchase order
<i>Supplier Site</i>	The supplier site
<i>Buyer</i>	The Procure-To-Pay department Buyer name
<i>Authorization Status</i>	The authorization status of the purchase order shipment (Approved, Cancelled, etc.)

VIEW PURCHASE ORDER DISTRIBUTIONS WINDOW


Use the Purchase Order Distributions window to view purchase order distribution information. Close window back to other open windows or navigator window.

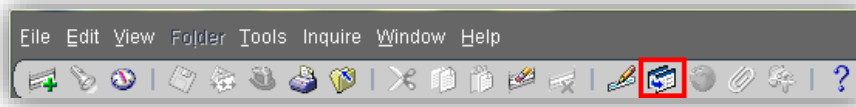


Field	Description of fields used by OU
<i>Number</i>	Purchase Order Number resulting from query
<i>Release</i>	This field not used.
<i>Line</i>	Line item number on the purchase order
<i>Shipment</i>	Line item shipped
<i>Distribution</i>	Line item distributed to an account code
<i>Item</i>	This field not used.
<i>Description</i>	Description of line item
<i>UOM</i>	The unit of measure for the line item ordered
<i>Quantity Ordered</i>	Quantity of line item
<i>Charge Account</i>	Oracle account code encumbered for dollar amount of item
<i>Amount</i>	Dollar amount of line item encumbered to charge account
<i>Approval Status</i>	The Approval Status of the purchase order (Approved, Cancelled, etc.)
 <i>PO Distributions window / Fund</i>	The Fund segment of the account code charged

ZOOM TO IMAGED PURCHASE ORDER

The only **purchase orders that are imaged are manually entered purchase orders (in Oracle) that are printed and mailed to the supplier.** To access the imaged purchase order that has been manually entered:

1. Enter the purchase order number on the *Find Purchase Order* window. Click **Find** button. The *Purchase Order Headers* window displays.
2. Click on the row of the purchase order (if more than one).
3. Click the zoom icon  in the menu toolbar. The purchase order image opens.



4. If there are multiple documents linked, they will be listed under a Document Name. Click on one of the documents to open it. If there is only one document, the document will automatically open.

PURCHASE ORDER					
ORDER NO.	B955 27882	SHIP TO ATTENTION	REVISION	0	PAGE 1 OF 1
BUYER	Patton, Stephen A	DATE OF ORDER	17-JUN-14	TYPE OF ORDER	<input type="checkbox"/> Confirming <input type="checkbox"/> Firm
REQUESTOR	Jane Bobcat	PAYMENT TERMS	Net 30	SHIP VIA	USP
SUPPLIER		OHIO UNIVERSITY OFFICE OF DESIGN AND CONSTRUCTION THE RIDGES, BUILDING 19 ATHENS, OH 45701		SHIP TO:	OHIO UNIVERSITY 140 W Union St Office Center Suite 154 Athens, OH 45701
INVOICE TO:		OHIO UNIVERSITY - Republic 300 Center, Room 312A Athens, OH 45701-2979 740-593-1960			
PRICE CONFIRMED BY	DRC 153				
FRIGHT	Allowed				
F.O.B	F.O.B				
LINE	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	AMOUNT
1	TO ENCUMBER ADMINISTRATIVE FEES FOR RIDGES ROOF REPLACEMENT PROJECT	5725.57	1.00		5,725.57
2	TO ENCUMBER PROJECT DEVELOPMENT FEES FOR RIDGES ROOF REPLACEMENT PROJECT	9542.6	1.00		9,542.60
Total					15,268.17

Supplier Notes:

VOID
AUTHORIZED SIGNATURE

Terms and Conditions on Reverse are part of this order.
This order is exempt from Ohio Sales Tax and all Federal Tax. FEIN 31.6402113

ZOOM-VIEW OR PRINT ANY IMAGED DOCUMENT

Refer to the *Oracle Navigation* document.