



CENTRAL**SQUARE**
TECHNOLOGIES

PO Inquiry

(POIQ)

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Overview

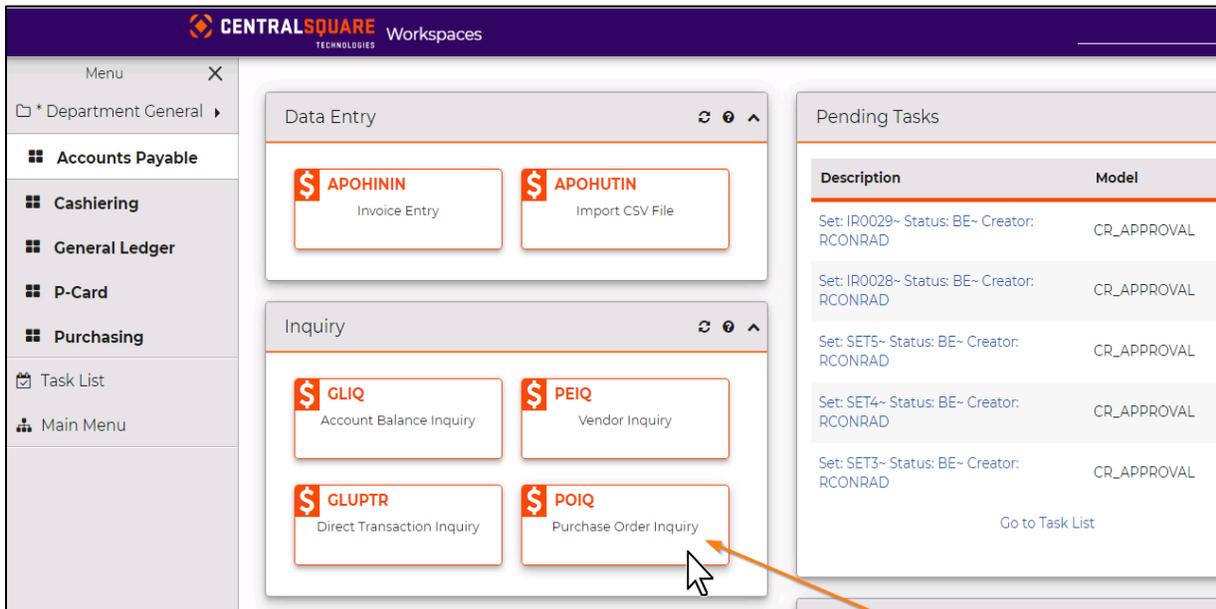
ONESolution provides a screen that allows users to view information about purchase orders and purchase requests for vendors. Use the Purchase Inquiry (POIQ) screen to view purchase order details. This is a display-only screen, and you can use the different sections to view the specific details associated with the purchase request or purchase order.

Accessing the POIQ Screen

There are several ways that users can access this screen once logged into the ONESolution application.

Using a Link

On the Department General workspace, select the Purchasing Task Center. From the inquiry component, select the link for POIQ.

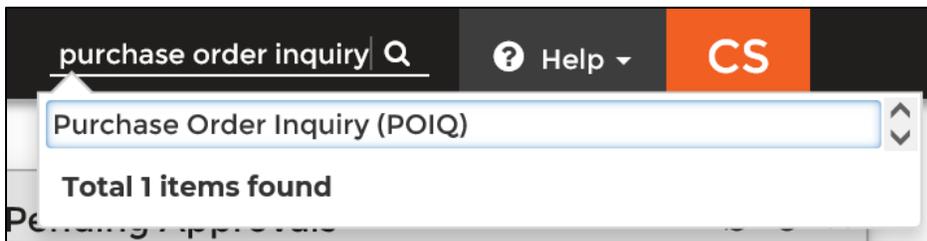
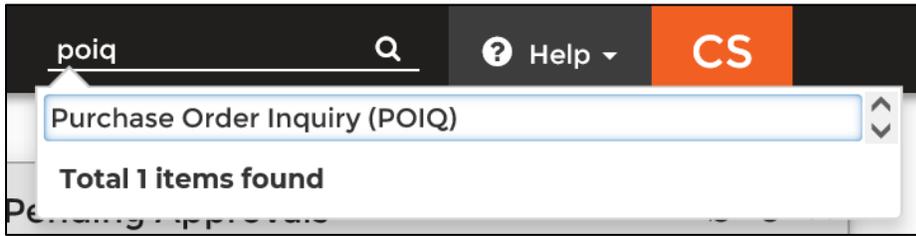


The screenshot displays the CENTRAL SQUARE Workspaces interface. On the left is a navigation menu with options: Accounts Payable, Cashiering, General Ledger, P-Card, Purchasing, Task List, and Main Menu. The main area is divided into two panels: 'Data Entry' and 'Inquiry'. The 'Data Entry' panel contains two buttons: 'APOHININ Invoice Entry' and 'APOHUTIN Import CSV File'. The 'Inquiry' panel contains four buttons: 'GLIQ Account Balance Inquiry', 'PEIQ Vendor Inquiry', 'GLUPTR Direct Transaction Inquiry', and 'POIQ Purchase Order Inquiry'. An orange arrow points to the 'POIQ Purchase Order Inquiry' button. On the right side, there is a 'Pending Tasks' section with a table listing tasks and a 'Go to Task List' link.

Description	Model
Set: IR0029- Status: BE- Creator: RCONRAD	CR_APPROVAL
Set: IR0028- Status: BE- Creator: RCONRAD	CR_APPROVAL
Set: SET5- Status: BE- Creator: RCONRAD	CR_APPROVAL
Set: SET4- Status: BE- Creator: RCONRAD	CR_APPROVAL
Set: SET3- Status: BE- Creator: RCONRAD	CR_APPROVAL

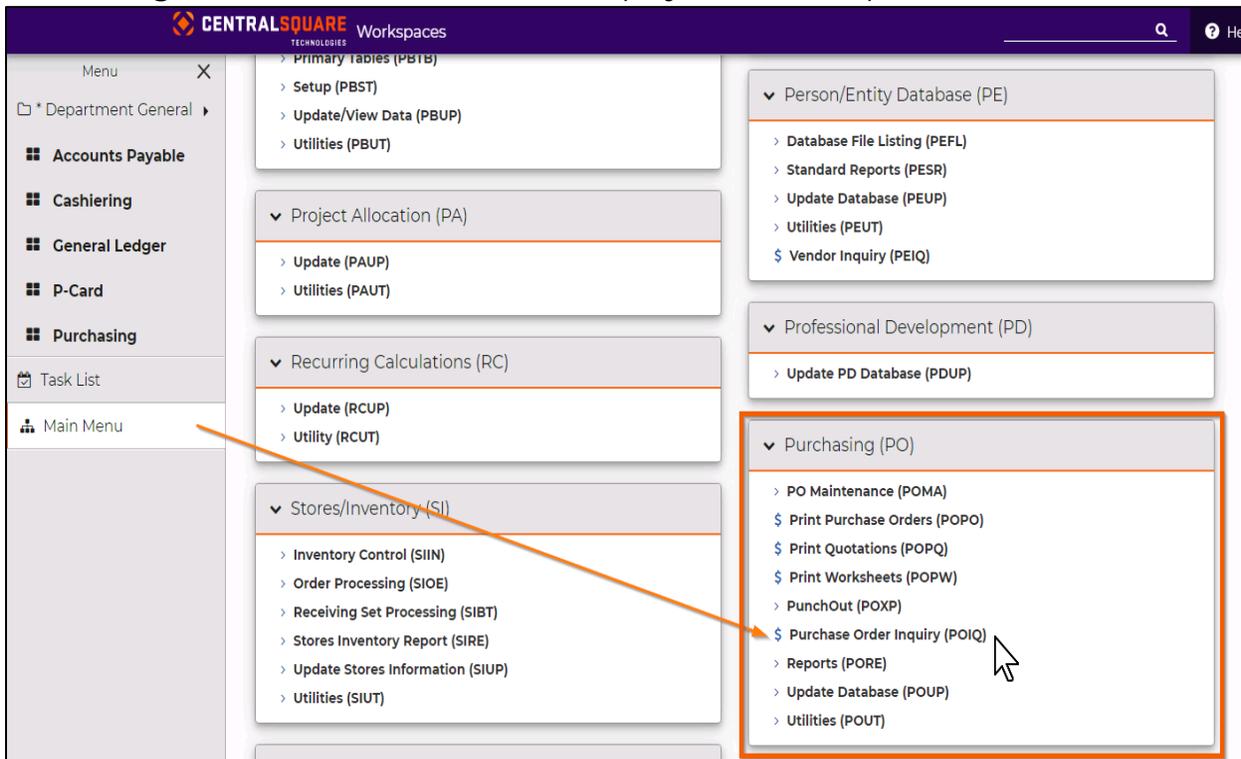
Using a Search Bar

This screen can also be loaded using information entered into the Search field in the top-right corner of any screen or on the Workspace tab. In the search field enter the menu mask for the screen, PEIQ, or enter the name of the screen as shown below and select the link to load the screen.



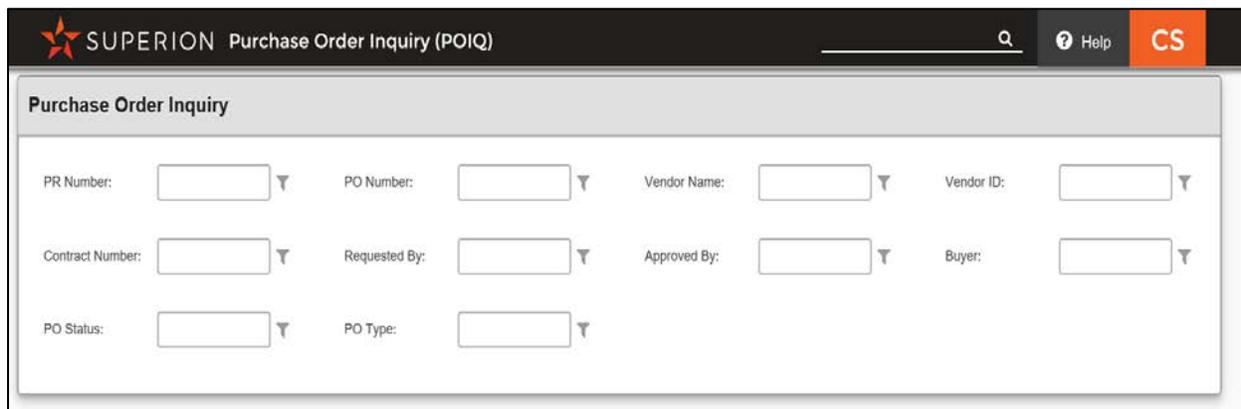
Using the Main Menu

Another navigation option is to use the Main Menu option found below the Task Lists. Click on Main Menu, and then scroll down to find the section for Purchasing. Click on Purchase Order Inquiry (POIQ) to open the screen.



Searching for PR/PO Information

After the POIQ screen loads, complete any of the search fields in the top panel to locate a record. The more fields that are populated, the few results will be returned.



PR Number – Enter the purchase request number.

PO Number – Enter the purchase order number.

Contract Number – Enter the contract number associated with the purchase request.

Requisitioned by – Enter the name of the user who created the purchase request.

Approved by – Enter the name of the user who approved the purchase request.

Buyer – Enter the ID associated with the buyer.

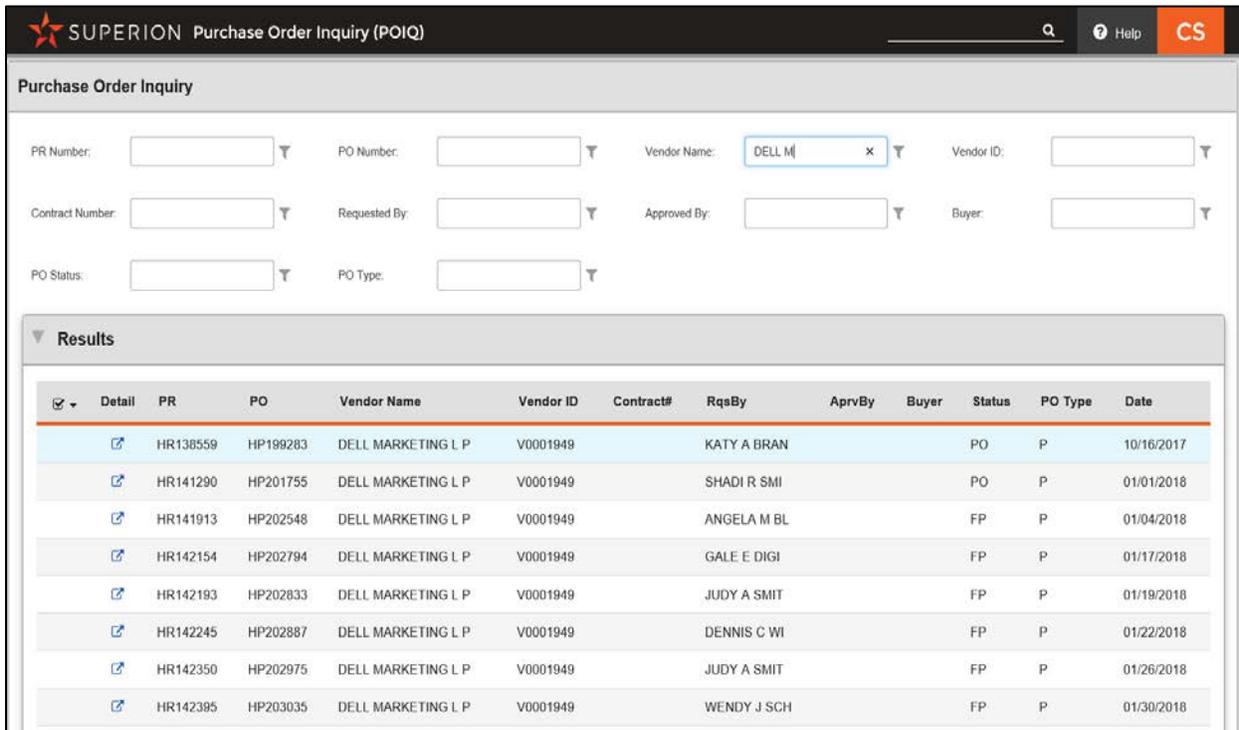
Vendor ID – Enter the person entity (PE) ID of the vendor.

Vendor Name – Enter the name of the vendor.

PO Status – Enter the status of purchase order. Prior to approval, it remains in the "PR" status. After it is approved, the status changes to "PO."

PO Type – Enter the type of the purchase order. You can specify blanket, contract, or standard.

In this first example, a search will be made for all the POs for a vendor. First type in the vendor name. This will bring up a list of all purchase requests and orders for vendors with a matching name.



The screenshot shows the SUPERION Purchase Order Inquiry (POIQ) interface. The search filters are as follows:

- PR Number:
- PO Number:
- Vendor Name:
- Vendor ID:
- Contract Number:
- Requested By:
- Approved By:
- Buyer:
- PO Status:
- PO Type:

The Results table contains the following data:

Detail	PR	PO	Vendor Name	Vendor ID	Contract#	RqsBy	AprvBy	Buyer	Status	PO Type	Date
Detail	HR138559	HP199283	DELL MARKETING L P	V0001949		KATY A BRAN			PO	P	10/16/2017
Detail	HR141290	HP201755	DELL MARKETING L P	V0001949		SHADI R SMI			PO	P	01/01/2018
Detail	HR141913	HP202548	DELL MARKETING L P	V0001949		ANGELA M BL			FP	P	01/04/2018
Detail	HR142154	HP202794	DELL MARKETING L P	V0001949		GALE E DIGI			FP	P	01/17/2018
Detail	HR142193	HP202833	DELL MARKETING L P	V0001949		JUDY A SMIT			FP	P	01/19/2018
Detail	HR142245	HP202887	DELL MARKETING L P	V0001949		DENNIS C WI			FP	P	01/22/2018
Detail	HR142350	HP202975	DELL MARKETING L P	V0001949		JUDY A SMIT			FP	P	01/26/2018
Detail	HR142395	HP203035	DELL MARKETING L P	V0001949		WENDY J SCH			FP	P	01/30/2018

In this next example, the vendor name and requestor name will both be used to produce results limited to those entered by a specific person.

Purchase Order Inquiry

PR Number: PO Number: Vendor Name: Vendor ID:

Contract Number: Requested By: Approved By: Buyer:

PO Status: PO Type:

Results

<input checked="" type="checkbox"/>	Detail	PR	PO	Vendor Name	Vendor ID	Contract#	RqsBy	AprvBy	Buyer	Status	PO Type	Date
🔗		PR000030	P000022	DELL MARKETING L P	V0001949		Denny Winner			FP	P	09/12/2018

Searches can also be made for a specific purchase request or purchase order number as shown in the next two screen shots. The system applies the trailing wildcard to the end of search criteria. In the below case, it finds all purchases request that start with a PR number "PR000030".

Purchase Order Inquiry

PR Number: PO Number: Vendor Name: Vendor ID:

Contract Number: Requested By: Approved By: Buyer:

PO Status: PO Type:

Results

<input checked="" type="checkbox"/>	Detail	PR	PO	Vendor Name	Vendor ID	Contract#	RqsBy	AprvBy	Buyer	Status	PO Type	Date
🔗		PR000030	P000022	DELL MARKETING L P	V0001949		Denny Winner			FP	P	09/12/2018

When a record is selected in the Results window, the remaining information on the POIQ screen will be related to that result.

Purchase Order Summary

This panel is populated with data from the Purchase Requests (POUPPR) screen. Information on any of the related tabs in this panel can be viewed by clicking on the tab.

Purchase Order Summary

1 Attachment(s)

PR: PO: Status: Sec Cd: Aprv:

Vendor: RemitTo: ShipTo: BillTo: Address:

DELL MARKETING L P

Phone Cd: E:

By: Date: Confirming Person:

PO Total: Invoiced: Balance: Cust / Order #:

Bid #: PO Type: Contract #: Pay By Amount: End Use: Account Terms:

Buyer:

Items

This tab is populated with data from the Items tab in the Purchase Requests (POUPPR) window.

Items

Item Number	Quantity	GL Account	Units	Description	Unit Price	Extended Amt	Product Code	Brand Code	Brand Description	Pct Discount	Discount
0001	1	GL001351159-65401		SERVER FOR IT	5,500.00	5,500.00				0.00	0.00

Encumbrance

This tab is populated with data from the Direct Update of EN Transactions (ENUPTR) window. A record with an EN Type of EN is created for each combination of PR Item # and GL Account when the record is created. Records are also created when payments are entered against the PO or the PO is cancelled or disencumbered. These records will have an EN Type of PP, FP, CA, or DE.

▼ Encumbrances

Reference	Vendor ID	GL Account	Description	EN Type	Quantity	PR #	PR Item #	Unit of Measure	Due Date	Relate 1	Relate 2	Tax Code	Tax Ar
P000022	187	GL001351159-65401	SERVER FOR IT	EN	1	PR000030	0001		09/12/2018				
P000022	V0001949	GL001351159-65401	SERVER FOR IT	FP	1	PR000030	0001		09/11/2018				

Distributed Invoices

Invoices that have been entered in the Accounts Payable system and that have been posted appear in this section.

▼ Distributed Invoices

Attachments	GL Account	Description	Invoice	Quantity	PO#	P/F	Unit Price	Due Date	Relate 1	Relate 2	Dist Amount	Received Date
	GL001351159-65401	SERVER FOR IT	DELLSERVER 12345	1	P000022	F	5,500.00	09/11/2018			5,500.00	

Not Distributed Invoices

Invoices that have been entered in the Accounts Payable system but that have not been posted appear in this section.

▼ Not Distributed Invoices

Attachments	GL Account	Description	Invoice	Quantity	PO#	P/F	Unit Price	Due Date	Relate 1	Relate 2	Dist Amount	Received Date