UNIT4

Reference Manual

Experience Pack

Requisitions 1.6

In business for people.

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The documentation is designed to support Unit4 Business World On!.

This document is intended for Unit4 Business World On! Consultants and customer Super Users, and thus assumes in-depth knowledge of existing Unit4 Business World On! functionality.

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Unit4 welcomes your comments as part of the process of continuous development and improvement of the documentation. Please contact Unit4 Customer Support if you have any questions.

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About the Requisitions Experience Pack

Requisitions Experience Pack

The Requisitions Experience Pack is part of the Business World On! solution for the employee.

You can easily find products, enter purchase requests and go shopping in various market places. You can see the status of your orders, and an easy to interpret calendar provides an overview of your expected deliveries. This can also be filtered by cost centres or projects, depending on the setup. Order confirmations can also be easily maintained in the **Order follow up** window.

Find products

The **Find products** functions as an internal online shop, so that you can easily search for and order products and services available in Business World On!, in a familiar web shopping atmosphere. When you are done, if workflow is implemented, the content of your shopping cart is transferred to a purchase request and sent for approval.

Find products consists of the following features:

- Free text search
- Category search
- Possibility to view search results in different views
- Filter functionality
- Purchase lists.

The solution is very flexible. It is delivered with a default setup but can easily be configured using the **Product search configuration** window. All data from the **Product master file**, including flexi fields and relations can be used in the setup.

Find products works on PC, tablet and mobile.

Using the search

You can search for products and services through a free text or category search. When using the free text search, several words can be entered into the search field simultaneously, to return a more precise search result.

The search result can be displayed in a list or table view. You can display the product details to view more information about each product, and also enlarge the product image.

Regardless of the type of search, a filter pane is displayed with the search results to help you work as efficiently as possible.

The filters are based on the search result, i.e. only filter values containing data are shown in the list. A filter is activated by one click and automatically reset when you preform a new search.

You can either use the standard filters that are available for all users, or if the standard alternatives are not specific enough, add temporary filters available only to you.

Purchase lists

You can save the contents of your shopping cart as a purchase list to make future ordering easier. These purchase lists can be distributed to colleagues as needed. System administrators can also create and maintain purchase lists centrally, with the purchase lists available to all users in the organisation. When saving the purchase list, you can choose whether to save it with or without a quantity, depending on your requirements.

Users can use the purchase list functionality to add the complete purchase list to the shopping cart, while other users can use it to retrieve favourite their products and add only these items to the cart. Each user can maintain their personal purchase lists and add or remove products, as well as save comments to specific products.

The shopping cart

You can add products to the shopping cart by dragging and dropping, or by clicking the **Add to cart** button. To indicate that a product has been added to the cart, the **Add to cart** button changes colour from blue to green in the list. When the cart is complete, the **Purchase request** window opens, where you can add additional information before the purchase request is saved or sent for approval.

Purchase request

The **Purchase request** window lets you add products to your request, and group the products according to their delivery addresses.

Attach a document to a product line

The document archive functionality that allows you to attach a document to a transaction, is available in several Experience Packs. In the **Purchase request** window you can use the standard document archive functionality, and add a document to the requisition. You can also add a document to the individual product order line, so that other users can easily check the attached information. This is useful so that you can attach documents that are relevant only to that particular product line.

Punchout to an external market place

External market places can be easily integrated into the start page so that you can shop and still appear to be within the Experience Pack. When you proceed to checkout, the **Purchase request** window opens where you can check the contents of your shopping cart, and also add internal products.

Calendar showing expected deliveries

The calendar on the start page gives you a quick and easy way to see expected deliveries. An icon with a number shows how many deliveries there are on a given date. When you click on the icon, a popup window lists the deliveries, and you can click on an order to open the **Goods receipt** window to receive the order.

Purchasing

About the Purchasing start page

The **Purchasing** start page is shown below.
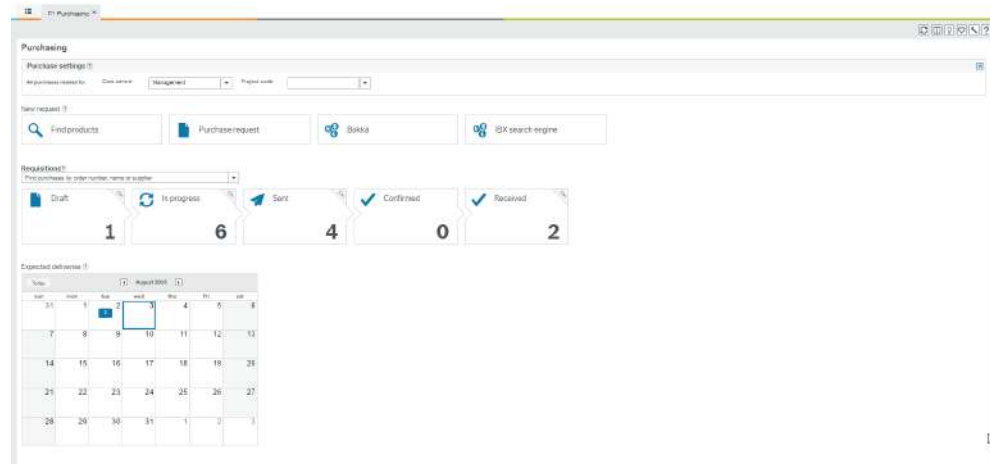
From this start page you can go to **Find products**, where you can search for a product that you want to purchase. You can also go to **Purchase request** and you can shop in various External markets.

Which purchases do you want to see?

There are 2 different ways that you can access the **Purchasing** window, from the Procurement or Your Employment module.

1. If you open the **Purchasing** window from the Procurement module, then the **Purchase settings** section is available with **All purchases related to**, allowing you to filter the content of the process boxes. If you want to see all purchases and requests for a cost centre, select the relevant cost centre or other criteria.
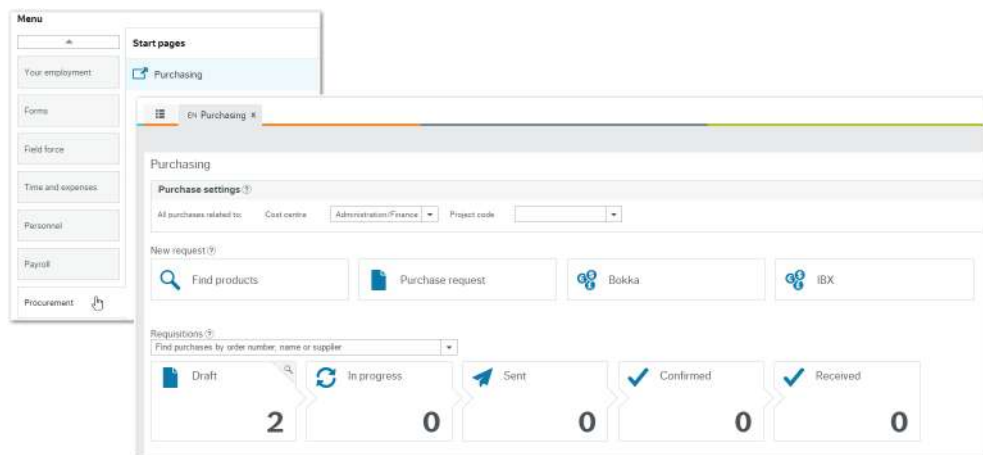
> 📝 Note: When you continue to **Purchase request**, the default header settings will be defined by the selected values, but they can be changed.

2. If you open the **Purchasing** window from Your Employment, then the content of the process boxes will be filtered by the requests entered by the user.
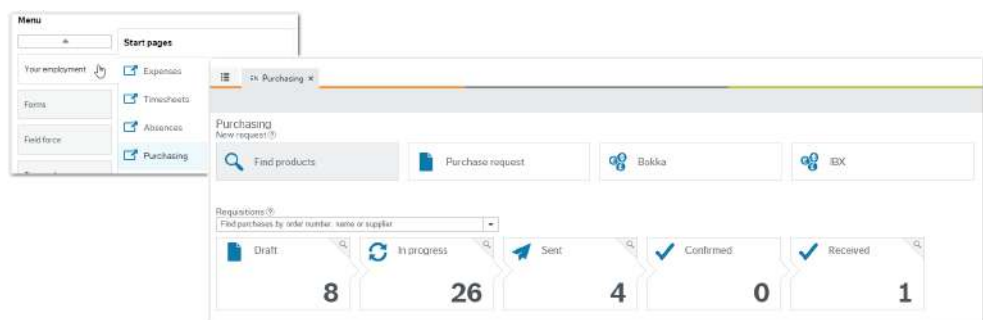
> 📝 Note: When you continue to **Purchase request**, the default header settings will be defined by the cost centre associated to the user, but they can be changed.

Find products

In the **Find products** window you can search for products and services using a free text or category search. When using the free text search, several words can be entered into the search field simultaneously, to return a more precise search result.

The search result can be displayed in a list or grid view. You can select the product details to view more information about each product, and also enlarge the product image.

Regardless of the type of search, a filter pane is displayed with the search results to help you work as efficiently as possible.

The filters are based on the search result. In other words, only filter values containing data are shown in the list. A filter is activated by one click and automatically reset when you perform a new search.

You can either use the standard filters that are available for all users, or if these are not specific enough, add temporary filters available only for you.

Purchase request

The purchase request window lets you add products to your request, and group the products according to where you want them delivered.

Punchout to external markets

External markets can be easily integrated to the start page so that you can shop, and still feel that you are within the Experience Pack. When you proceed to checkout, the **Purchase request** window opens, where you can check the contents of your shopping cart, and also add internal products.

Find purchases by order number, purchase request name or supplier

You can find your purchase request and purchase order in this search field.

You can search using the:

- purchase order number
- purchase request number
- purchase request name
- supplier name on the purchase order.

Calendar showing expected deliveries

The calendar gives you a quick and easy way to see expected deliveries. An icon with a number shows how many deliveries are on a given date. When you click on the icon, a popup

window lists the deliveries, and you can click on an order to open the **Goods receipt** window to receive the order. The icon number is updated when you open the **Purchasing** start page.

The process boxes

What the process boxes show

The process boxes show the purchase requests and orders grouped according to their order status.

If you click on the magnifying glass, for example on Draft orders, a popup window will show you a list of orders that you have saved as draft. Click on the order to view the details or amend it.

Filtering the process box content

You can filter the content of the process boxes. If you want to see all the purchases and requests for a specific cost centre, or other criteria, select the relevant cost centre or project. These values will then become the header settings when you continue to **Purchase request**, but they can be changed.

> Note: Filtering works on header categories (GL analysis such as cost centre, project, work order, activities etc.) and for these to be transferred to the Purchase order, the system parameter PO_CONSOLIDATE must be deactivated.

Order status in process boxes

This is the grouping of order status in the process boxes:

- **Draft** - Purchase requests (requisitions) with status: **Parked**.
- **In progress**- Purchase requests (requisitions) with order status: **Entered** (No work-flow), **Awaiting approval**, **Approved**, **Rejected**, and **Partially approved**.
- **Sent** - Purchase order has the order status : **Ordered**, the order has been sent to the supplier.
- **Confirmed** - Purchase order has the order status **Confirmed** (by the supplier). A pur-chase order has the status **Confirmed** when there is no difference between the Purchase order and the order confirmation from the supplier, or if the changes made by the supplier have been approved.
- **Received**- The purchase order has been received (totally or partially).

Note: You can use Window options to hide or show the process boxes.

Find products

Window usage

In **Find products** you can:

- Search for products and services available in the system.
- Narrow down your search result using features.
- Add products to the shopping cart.
- Create, maintain, delete and distribute purchase lists (recurring purchases).
- Go to **Purchase request** window and create a purchase request based on your shopping cart.

The example below shows a search being done in **Find products**:
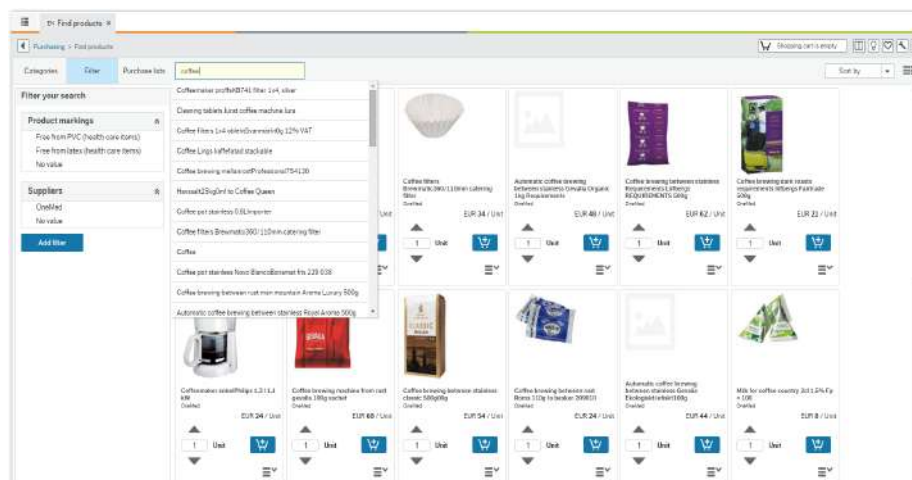
Note: The setup of **Find products** is customer-specific, therefore there can be differences between images in this documentation and the corresponding view in your browser.

About the search field

You can search for products and services using the search field.

- When you have entered three characters in the search field, the system starts searching for products that match the search criteria.
- It is recommended to enter several words in order to limit the number of hits in the search result list (random order is accepted).

- Products that match the search text will automatically be displayed underneath the search field.
- Click **Enter** to view the full search result, or select the product you want to view directly from the list.

The first time you perform a search the results are shown in grid view. Press the toggle button if you prefer to view it in list view. You can display the product details to view more information about each product and also enlarge the product image.

About the free text search setup

When a free text search is performed, predefined columns in the product master file, relations and/or flexi-fields, are checked in order to display a search result. These predefined columns are configured by each customer; please contact your system administrator for more information about your system setup.

Search for a product

1. Enter your search phrase in the search field. As you type, the best combinations appear in the list.
2. You can select your product from the list, or click enter to have the complete results displayed.

Interpret the search result

When performing a successful search, one or more products will be presented in the search results. Click the product description or product image to view the details of a specific product.

Some products may differ from others when it comes to layout and/or expected handling.

Information products

An information product is an article that is searchable in **Find products**, but is not orderable. Its main purpose is to inform the requisitioner how and where to order a product or service. To distinguish the information product from other orderable products, the 'Add to cart' button has been replaced by an 'Information' icon, preventing the user from adding this type of product to the cart.

Amount use products

An amount use product is an article that has a fixed quantity (1), and has an editable price which is used to follow up on sales and purchases. This is commonly used when purchasing services, for instance consultancy hours for a project.

This type of product is probably combined with a flexi-field group definition (form), but can be used standalone as well.

Form based products

A form based product is based on a flexi-field group definition, e.g. a form that contains one or several predefined fields. The user is expected to enter additional product information required by the supplier as they create the Purchase request. The information is included as Additional information and can also be transferred to the Purchase order.

The form products are identified by the 'form icon', that has replaced the **Add to cart** button.

Ranked products

Within some business areas it is common (or even required) to rank supplier contracts, with the aim of helping the requisitioner to select preferred suppliers products.

In order to ensure that the requisitioners follow the internal procurement policy, a validation is done when a product is added to the cart. If the current product is subject to low-ranking (different from blank or 1), the window 'Deviation from ranking' will appear, in which the user is expected to explain why the product with the highest ranking has not been selected. Once this has been done, it is possible to add the product to the cart and proceed with the requisition.

Filter the search result

When the search results are shown the filter menu is automatically displayed, enabling you to narrow down the search result further.

The filters are based on your current search result. Therefore, the next time you perform a search, the available filter values will be adjusted according to existing conditions.

- Select one or several filter values by clicking a value once. To remove a filter, click the value again.

Add additional filters

It is possible to add additional filters if the standard filters are not specific enough.

1. Click **Add filter** in the Filter section.
2. A new window opens where you can use a column and operator as a basis for the temporary filter.

> Note: These filters cannot be saved, and are automatically removed when you leave the **Find products** window.

Add several filters to your search result

- You can also combine several filters, for example a product from supplier XX, that belongs to category XX, and that are within price range XX-XX.

> 📑 Note. There is an 'AND-condition' between the different filter category criteria, but an 'OR-condition' when selecting several values within the filter category.

Search using the tree structure

The tree structure is used to search for products based on different categories; instead of performing a free text search based on, for example product description, you can browse products from a specific supplier or browse products related to a certain product classification category etc.

Use the arrows to click down to the required level in the tree structure. Click on the descriptive text in order to search for products in that particular category.

No search result?

If your search did not produce any result, this message is displayed below the search field: *Your search produced no results*.

Try one of the following options:

- Check the spelling.
- If your search contained several words, remove one of these and search again.
- Try searching using a similar or related term. For example, if 'A4' doesn't show the result needed, try searching for 'paper'.
- Search by category instead of using a free text search.
- If you still cannot find what you are looking for, please contact your purchasing department.

The shopping cart

It is possible to add products to the shopping cart one by one, or in bulk, using a purchase list.

If a product you are adding to the cart has a minimum order quantity accepted by the supplier, a message will inform you that an incorrect quantity has been entered. The same occurs if entering a value that is not a factor of the product increment (for example, some products may only be able to be ordered by a factor of 5. Maybe 5 pens, 10 pens, 15 pens, but not 12 pens).

If a product is subject to ranking, and it does not have the highest ranking when it is added to the cart, a window will appear requesting you to enter a reason to explain why this purchase

is necessary. Please note that product ranking requires additional setup, therefore is not used by everyone.

When you add a product to the shopping cart, the blue **Add to cart** button changes to green, to show that the product has been added.

The cart is constantly updated with the current number of products.

Add to cart one by one

- Click **Add to cart** on the product.

or

- Drag and drop the product to the shopping cart.

Add products to the cart from a purchase list

1. Click **Purchase lists** to display the available purchase lists and details.
2. Check that the quantity is correct on each product row. Products with quantity '0' will not be added to the cart.
3. Click **Add all to cart**.

The products that have been added to the cart have a green **Add to cart** button, instead of the regular blue button.

If you want to order the same quantity of each product the next time, remember to click **Save changes**.

Using the shopping cart

Click the shopping cart to view its contents.

- If you want to delete a product in the shopping cart, click the **Delete** icon on the product line.
- To delete all products in the cart, click **Empty cart**.
- Change the quantity of the product.
- Click **Go to Purchase request** where you can finalise your shopping, group delivery addresses etc.

Product search configuration

This is a setup window for configuring **Find products**, and will only be used by system administrators or other technical experts. We strongly recommend that access to this window is restricted to a limited number of roles/users within your organisation.
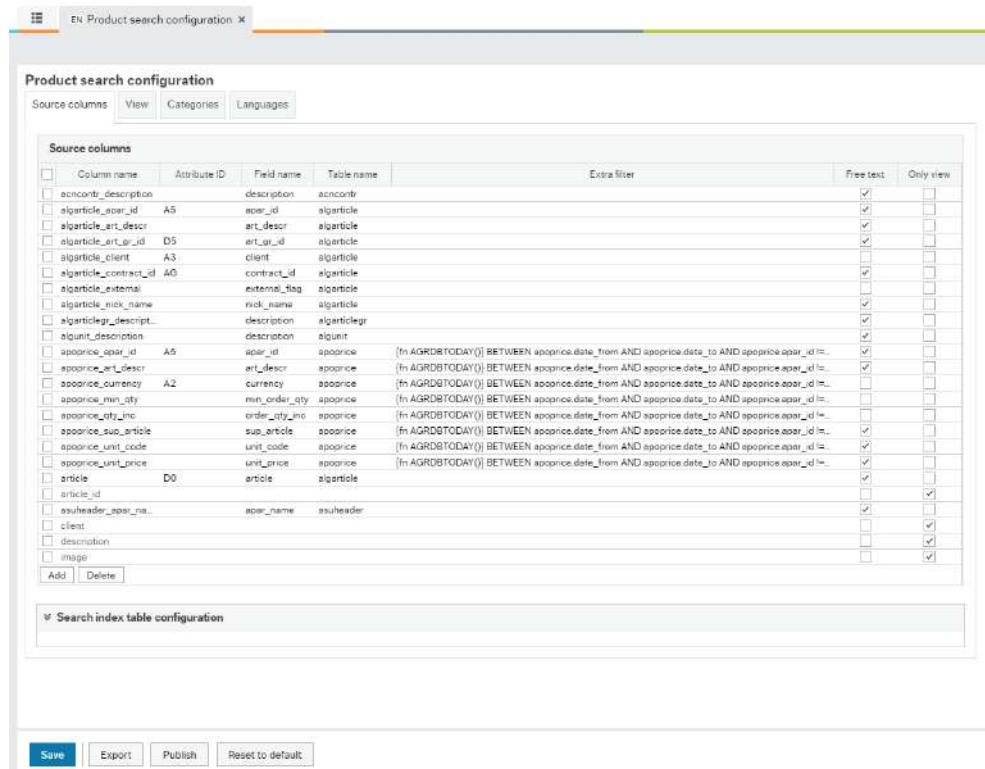
Default template

A default template with a set of preset columns, categories and filters is provided when you open the **Product search configuration** window for the first time. Therefore, you do not have to build a custom configuration from scratch in the **Product search configuration** window.

> 📋 Note: The attribute PRODMARK (D700), and the relation between PRODUCT (D0) and PRODMARK (D700), must exist in the system.

Window usage

The **Product search configuration** window is shown below.

This window allows you to configure the:

- Values that are checked in order to find products and services when performing a free text search.
- Information that is presented in the free text search drop-down list.
- Information presented in the Product details view.
- Values that should be available in a category search.
- Values that are setup as filters.
- Columns that are visible in list view.
- Language to be used for columns where a language code exists.
- Instantly publish updated product information and/or new configuration manually.

Maintenance is only necessary if the default template configuration does not meet the customer's requirements.

Values can be added and deleted in each function above, however, we recommend that you only delete values, after the suggested change has been assessed by a consultant, to ensure that no unexpected technical problems occur as a result of the change.

Product search configuration from a process perspective

Product Search Indexing Service (PSIS) is run on a regular basis (automatically) in order to ensure that relevant data is extracted from the product master file, to **Find Products**.

The system administrator enters **Product search configuration** in order to ensure that the requisitioner can view the relevant product master file data, as well as search and filter tools in product search in **Find Products**.

The requisitioner enters **Find Products** to search and order products and services from the supplier.

If it is necessary to immediately refresh the product information in **Find products**, or make immediate changes in the **Find products** layout, the system administrator can trigger a refresh manually using **Product search configuration**.

The Tabs in Product search configuration

- Source columns
- View
- Categories
- Languages.

Add a value to be used in the free text search

1. Select tab **Source columns**.
2. Scroll down to the bottom of the window and click **Add available**.
3. Enter column name followed by other required data. See "Columns and descriptions" on page 25 for details.
4. Check that *Free text* is selected.
5. Click **Save**.
6. Click **Publish**.

Add a new Category or Filter value

A value can be setup both as a Category and a Filter value, or only as one or the other.

1. Select tab **Categories**.
2. Click **Add available** in the Categories section.
3. Enter name followed by other required data. See "Columns and descriptions" on page 29 for details.
4. Ensure the following:
   - that the box *Is category* is ticked, if you want to show the value in the Categories menu.
   - the box *Is filter* is ticked, if you want to show the value in the Filter menu.
   - the box *Is category* and *Is filter* is ticked, if you want to show the value in both the Category and Filter menu.
5. Ensure that the newly created category is selected in the *Categories* section.
6. Then go to *Category details* section and click **Add**.
7. Enter source column name, followed by other required data. See "Category details – Description" on page 30.
8. Click **Save**.
9. Click **Publish**.

> 📝 Note: The values used in category details must exist in the tab **Source columns**.

Remove a Category or Filter value

A value that is used both in the Category menu as well as in the Filter menu, will be removed completely if you follow the process below.

If you only want to remove the value from one of the menus, clear the column *Is category* or *Is filter* and click **Save** and **Publish** to complete the action.

1. Select tab **Categories**.
2. Select the value you want to delete in the *Categories* section.
3. Click **Delete** in the *Categories* section.

4. Click **Save**.

5. Click **Publish**.

Add a column in the list view

1. Select the **View** tab.

2. Select in the **Find products** view **All products result**. The columns will become visible in the **Find products** columns section.

3. Click **Add available** in the **Find products** column section. Enter the column name, followed by other required data. See "Columns and descriptions" on page 25 for details.

4. Click **Save**.

5. Click **Publish**.

Edit information presented in the free text search drop-down list

1. Select the **View** tab.

2. Select in the **Find products** view **Quick search**. The columns will become visible in the **Find products** columns section.

3. Click **Add available** in the **Find products** column section. Enter the column name, followed by other required data. See "Columns and descriptions" on page 25 for details.

4. Click **Save**.

5. Click **Publish**.

> 📝 Note: We recommend that you only add the most important information. Many columns may negatively impact system performance.

Edit information presented in the Product details window

1. Select the **View** tab.

2. Select in the **Find products** view **Product details**. The columns will become visible in the **Find products** columns section.

3. Click **Add available** in the **Find products** column section. Enter the column name, followed by other required data. See "Columns and descriptions" on page 25 for details.

4. Click **Save**.

5. Click **Publish**.

Edit supported language codes

1. Select the **Languages** tab.

2. Click **Add**.

3. Enter required language code.
4. Click **Save**.
5. Click **Publish**.

> 🗐 Note: The current language code requires additional maintenance in Business World On!.

Refresh product information and configuration instantly in Find products

1. Make necessary changes in the **Product master file**, and/or **Product search con-figuration**.
2. Click the **Publish** button.

> 🗐 Note: The **Publish** button will only be enabled if a valid **Product search con-figuration** has been previously saved.

Transfer of information starts immediately and is available in **Find products** when the trans-fer has completed.

> 🗐 Note: The PSIS server log file is only updated when the indexing service is run as a timed process, and it is not updated when it is started manually through the **Product search configuration**.

Reset to default

Click the **Reset to default** button if you want to reset your current template to the default tem-plate configuration.

Source columns tab

Introduction

Source columns contain columns, flexi fields and relations that can be used when setting up **Find products**. These are retrieved from a number of tables in the system.

The tab is used to configure the following:

- To select what information is included in the free text search. In other words, used as meta data when searching for products and services.
- Ensure that columns available in the **View** tab, as well as Category or Filter menu item are correctly setup (the name used in the **View** tab should be identical to the name used in the **Source columns** tab).

The system administrator can manually add columns to the screen that are not available in the list. This is done using the Add button.

Adding a column is relevant, for instance, if you have created a new flexi field which has been linked to the product master file, and you want to make it visible to the users.

> Note: Some column values are mandatory in order for **Find products** to function. The values with the property **Only view** ticked, are not editable and cannot be deleted. Discuss with a consultant before you delete any columns.

Columns and descriptions

Columns	Description
Column name	Descriptive name for source column. A recommended standard is to enter table name_field name.
Attribute ID	If current column is an attribute, its attribute ID is entered in this field.
Field name	The column in the database table.
Table name	The table the current column originates from (field name).

Columns	Description
Extra filter	Possibility to add an extra filter using an SQL-query. For example, to display only the supplier specific row from the Purchase price table (for example, to hide the general row), the following SQL-query should be entered for all columns originating from table *apoprice*: {fn AGRDBTODAY()} BETWEEN apoprice.date_from AND apoprice.date_to AND apoprice.apar_id != ' '
Free text	Include the column in the free text search.
Only view	Represents mandatory columns that cannot be deleted. For this reason, rows with **Only view** ticked are not editable.

View tab

Introduction

The user is automatically shown the search results in grid view, after searching in **Find products**. If they prefer to view the information in list view, this is possible with a simple click. The grid view is fixed, therefore any new columns which are added may not be visible when using this view. To view all possible available columns, select the list view. The list view in **Find products** is flexible, and can be modified using the **View** tab.

Possible configuration

In this tab you can configure the following:

- The content included in list view, i.e. which columns are presented to the user.
- The information that is displayed to the user in the drop-down list, related to a free text search area.
- The information presented in the **Product details** view.

When you select the current **Find products** view, its content becomes visible in the *Find products* column:

- Allproductsresult = List view
- Quicksearch = Free text search drop-down
- Productdetails = Product details window.

However, the system administrator can add columns to existing views, if the current setup does not meet customer requirements. Only remove columns after a discussion with a consultant.

Columns and descriptions

Note: Values to be used in any of the views must exist in tab **Source columns**.

Columns	Description
Column name	The technical name of the column.
Display order	The order in which the current column should be displayed to the user.
Sort order	If necessary you can sort columns by clicking on the column title (only applicable for relevant columns).

Columns	Description
Title	The column name that is presented as a field header for the user.
Title ID	Title ID from title tool (enables translation to different languages).
Result display type	Type of content: • String = text • Bool = check box • Float = numeric value with decimals • Int = numeric value without decimals • (blank) = see description for column 'Treat as'.
Treat as	If the current column name refers to an attribute value that is linked to an image (e.g. PRODMARK), this column should refer to the value 'image'. Please note that the 'Result display type' should be blank, if the value 'image' is used.

Categories tab

Introduction

The tab **Categories** determines two things:

- The categories that are visible in menu item Categories in **Find products**. In other words, the values that the requisitioner can use to search for products and services using category search, instead of a free text search.
- The values that are visible in the menu item Filter in **Find products**. In other words, the values that the requisitioner can use to filter the search result when searching for a specific product or service.

A category value can act as both a category and filter. The system administrator decides during setup if the value is relevant as a Category and Filter menu item, or just one of them.

Using the Categories tab

The system administrator can add or delete Category values and filters by using the **Add** and **Delete** buttons beneath Categories. During maintenance the administrator can decide if the Category is used as Category and Filter, or just one of them by checking the box next to each value.

Each value entered in Categories can be complemented with category details. This is relevant, for instance, if a user wants to show a tree structure in the Category or Filter menu item:

- Food Beverage and Tobacco Products
- Beverages
- Non alcoholic beverages
- Alcoholic beverages.

Columns and descriptions

Columns	Description
Name	Current category/filter value (free text field).
Description	The category/filter name that is presented as a field header for the user.
Category type	Type of category: T = Tree.

Columns	Description
Is category	Tick this box if the value will be used as Category, otherwise leave unticked.
Is filter	Tick this box if the value will be used as Filter, otherwise leave unticked.

Category details – Description

> 🗒 Note: Values to be used as category details must exist in tab **Source columns**.

Columns	Description
Source column value	The value that is used for the Category and/or Filter must correspond to the column name in tab **Source columns**.
Source column description	The value that is used to present information in the Category and/or Filter menu item. If it is the same as in Source column value, this field can be left empty.
Category detail level	Type of category: T = Tree.

Languages tab

Introduction

Some columns, such as *Product text* and *Attribute value description*, are connected to a language code to allow for different languages, despite the values not being handled as titles in the system.

The **Languages** tab refers to the language codes in **Find products**, to make sure that the correct text information is shown to the user, if they use a different language code.

Text type Information text

Use Text type = **I** to retrieve the information text in **Product master file**. The image below shows the location in the product master file.

Click **Text** in the toolbar to find the *Information text* as shown in the image below:

The image below shows where within the product details the text is shown:

If you want this text to be included in the free text search, you must tick the box *Free text* in column *Description* in the **Product search configuration**. See the image below:

Using the Languages tab

Codes are added or removed using the **Add** or **Delete** button. At least one language must be setup. By default, the product template in **Product search configuration** is provided with EN = English.

Examples

Values that are checked in order to find products and services in a free text search

When the requisitioner searches for **Coffee** in **Find products**, a number of fields in the **Product master file** are checked in order to find a value that matches **Coffee**.

The system administrator decides in **Source columns** tab which fields are checked when a user performs a free text search. If column *Free text* is active the field is included.

As a result a number of products matching the search criteria are presented in **Find products**.

Information that is presented in the free text search drop-down list

When the requisitioner enters the word Coffee in the free text field in **Find products**, they are shown a drop-down list containing products that match their value. The tab **View** allows the system administrator to decide what information is presented in the drop-down list.

The example below refers to the product description field:

As a result the product description is presented to the requisitioner when entering a search value in **Find products:**

Information presented in the Product details view

When the requisitioner has performed a search and has been presented with a search result, they can view the details of the current product by clicking it once. The tab **View** allows the system administrator to decide what information will be presented to the requisitioner in the **Product details** view.

The example below refers to the fields alias, product group, supplier product id etc.:

As a result the product details will show a minimum of the Product ID and Supplier product ID, as these values exist for all products. If the current product has an entry in other fields, this information will also be displayed in the **Product details** window.
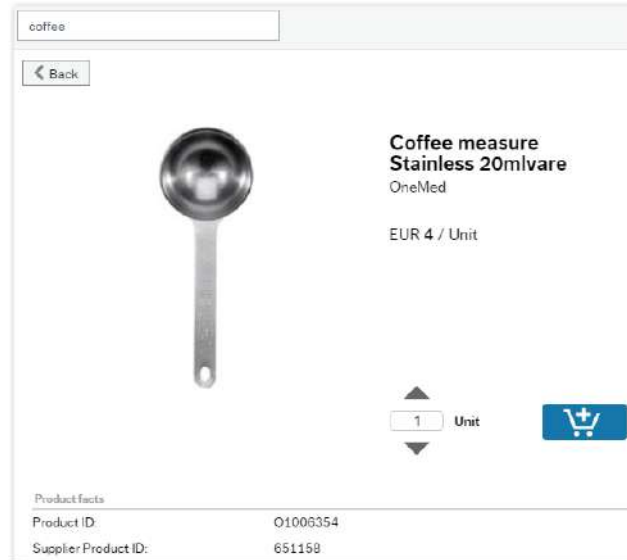
Values that should be available in a category search

The requisitioner can perform a free text search. or search by category to find the product.

The tab **Categories**, allows the system administrator to decide the categories that will be displayed in the Category menu item in **Find Products**.

The example below shows that Suppliers and Product groups are setup as Categories:

As a result the requisitioner can view these values in **Find products**.

Values that are set up as filters

The requisitioner can narrow down the search result by using the filter functionality.

The tab **Categories** allows the system administrator to decide the filters that will be displayed in the Filter menu item in **Find Products**.

The example below shows that Contract ID, Product markings and Suppliers are setup as Filters.
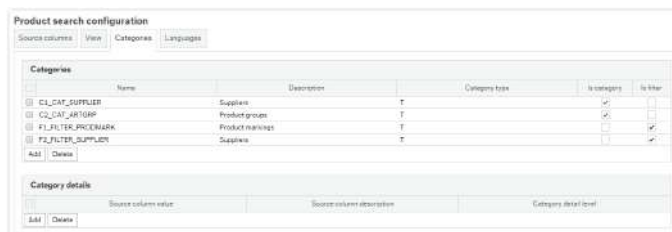
As a result the requisitioner can view these values in **Find products**. The filters are customisable and only show values that exist.

For example, none of the products in the search results below refer to a contract ID, where the filter does not appear.
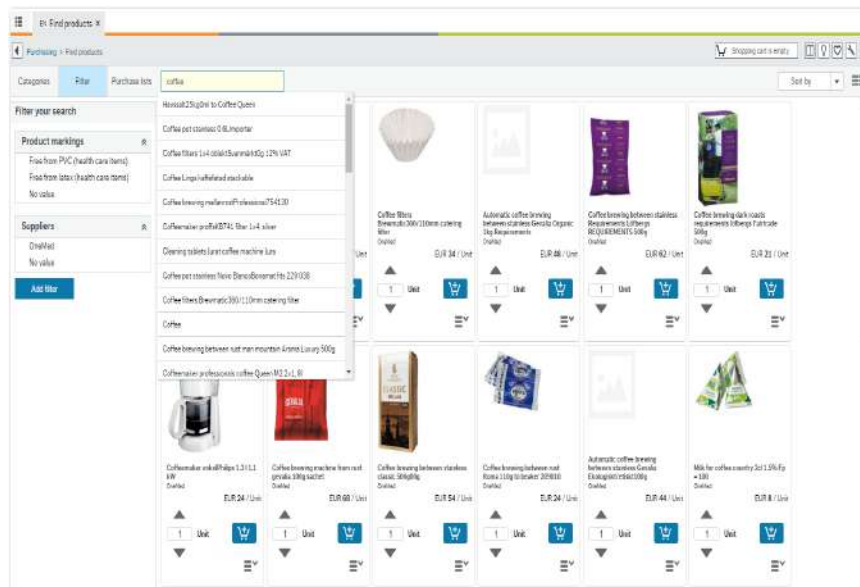
Columns that are visible in list view

When the requisitioner has performed a search and has been presented with a search result, they can select to view it in list view, instead of grid view. The tab **View** allows the system administrator to decide which columns will be visible to the requisitioner in the list view.

The example below shows that Client, article ID, article, Supplier ID etc. are included in the *All products result* view (list view), column ID Supplier ID is the fourth column, followed by Article description as column number 5:
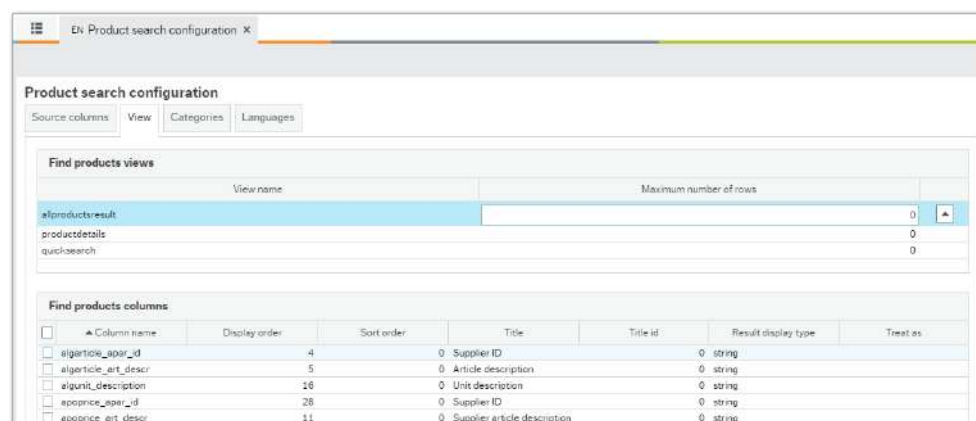
As a result, the requisitioner can view these columns in **Find products** (according to Display order setup in **Product search configuration**):
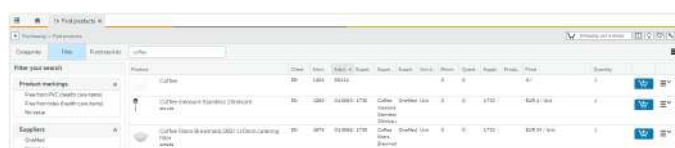
Manual publishing of new configuration and updated product information

Introduction

The **Product search configuration** is a setup window for configuring **Find products**. The Product search indexing service (PSIS), builds the index tables based on the setup in the **Product search configuration** window. It transfers the data from the **Product master file** to the index tables. These two combined ensure that the relevant product information is correctly presented to the user in **Find products**.

Note that in order for the PSIS to transfer data from the **Product master file**, the Searchable box in **Product master file** must be ticked.

Manually transferring configuration and product data

PSIS is set up as a timed process in the Business World On! Management Console, and normally runs once every day. However, if there have been changes in the Product master or **Product search configuration** that should be implemented immediately, it is now possible to start the transfer of configuration and product data manually. This is done by clicking **Publish** in the **Product search configuration** window.

> Note: The **Publish** button will only be enabled if a valid **Product search configuration** has been previously saved.

Transfer of information starts immediately, and is available in **Find products** when the transfer is completed.

Note about update of PSIS server log file

Note that the PSIS server log file is only updated when the indexing service is run as a timed process, and not when it is started manually through the **Product search configuration** window.
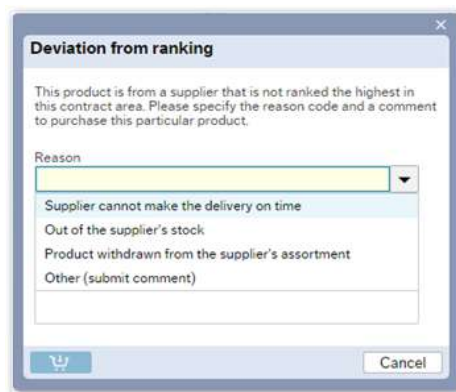
Optional configuration

Ranked products

About ranked products

Ranking of products is functionality that allows your organisation to encourage purchases from preferred suppliers. It also gives the purchasing department a possibility to follow-up on any purchases that deviate from ranking, allowing adjustments to be made to the supply, based on demand.

Product ranking is required within some business areas, while some customers choose to implement it with the objective of helping the requisitioner to select products from preferred suppliers. The ranking is added in the Purchase price table of the current product master file. Number 1 means that it is the highest ranked.

Validating ranked products

To ensure that the requisitioners follow the internal procurement policy, validation is done when a product is added to the cart. If the current product has a low-ranking (different from blank or 1), the **Deviation from ranking** window appears and the user is expected to justify why the product with the highest ranking has not been selected. Once this has been done, the product can be added to the cart and the requisition can be completed.

The information entered by the requisitioner is saved in the system database, enabling the purchasing department to follow-up on purchases made from a lower ranking supplier than expected, and if needed, adjust the supply based on demand.

Low ranked products and purchase lists

> 📑 Note: It is not possible to save low-ranked products in purchase lists. These products will automatically be excluded when the list is saved.

Required configuration for Ranked products

If ranking of products is applicable, then configuration is needed in the following areas:

- Product search configuration
- Attribute values
- Product master file.

Product search configuration

The field *Product rank* must be made visible in the **Find products** list view and product details view. To enable this, the column name *apoprice_product_rank* must be added in the **Product search configuration** (TPQ050) window, in the **Source columns** tab. See the section related to the **Source columns** tab in **Product search configuration** for more information related to the column *Extra filter*.

Add the column name *apoprice_product_rank* in the **All products result** view according to the setup below:

Add the column name *apoprice_product_rank* in the **Product details** view:

Example output List view:

Example input _Product details_ view:

Example output _Product details_ view:

Attribute values configuration

Define relevant attribute values for the attribute RANKREASON (LB). These values appear in the _Reason_ drop-down list, in the **Deviation from ranking** window.

For example:

Deviation from ranking

This product is from a supplier that is not ranked the highest in this contract area. Please specify the reason code and a comment to purchase this particular product.

Reason

Supplier cannot make the delivery on time
Out of the supplier's stock
Product withdrawn from the supplier's assortment
Other (submit comment)

Cancel

Product master file configuration

Each product subject to ranking must be allocated a current ranking, on the supplier specific purchase price row. This is done in Desktop, in the **Product master file**:

📋 Note: The field *Rank* available in the product master file tab **Price**, refers to the general price row. In other words, not the supplier specific rank, and therefore should not be used.

Information product

Introduction

An information product is an article that is searchable in **Find products**, but is not orderable. Its main purpose is to inform the requisitioner how and where to order a product or service. To distinguish the information product from other orderable products, the **Add to cart** button has been replaced by an **Information** icon, preventing the user from adding this type of product to the cart.
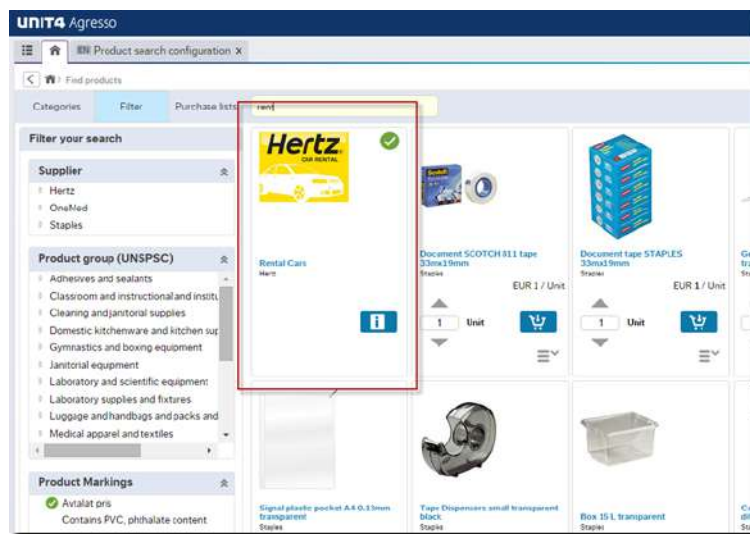
In **Product details**:
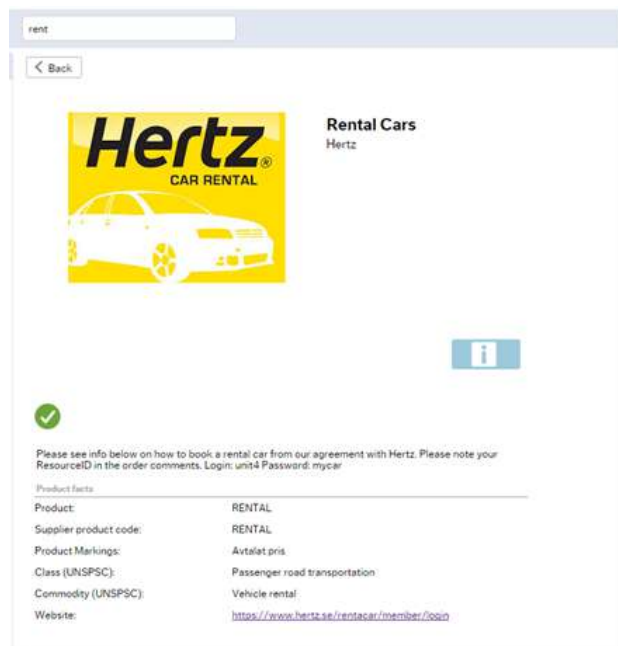
To make a product searchable in **Find products** but not orderable, maintenance is required in the **Product master file** and **Product search configuration**.

Setup in Product master file

Tick the box *Info*.

1. In the field *Alias*, enter words that the requisitioner is likely to use in a search, when looking for the current product or service in **Find products**.

2. Enter a product text explaining how to make an order.

Setup in Product search configuration

1. Enter the Source column *Info*:

2. Enter the column name *Info* in the *All products result* view (list view):

Amount use products in Find products

Introduction

An amount use product is an article that has a fixed quantity (1), and instead has an editable price which is used to follow up on sales and purchases. This is commonly used when purchasing services, for instance consultancy hours for a project. This type of product is probably combined with a flexi-field group definition (form), but can be used standalone as well.

Amount use in Find products

The example below shows an amount use product with a flexi-field group definition in **Find products**. Using the form information, the user is able to refer to a quotation number received from the supplier as well as a comment, in order to facilitate the work of the supplier receiving the Purchase order.
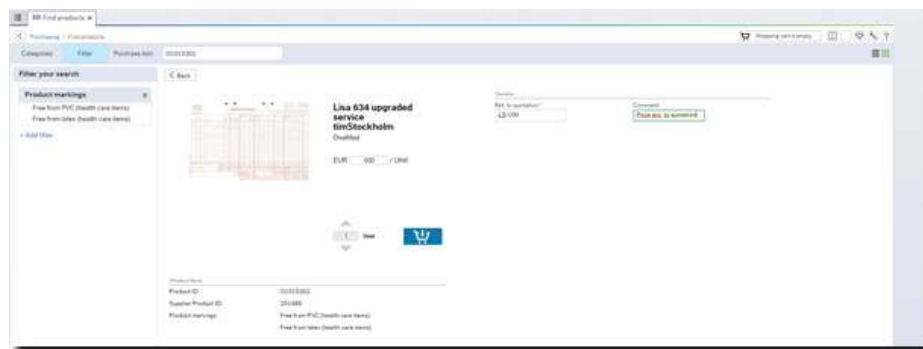
To make Amount use products available in **Find products**, maintenance is required in the **Product master file** and **Product search configuration** windows.

Setup in Product master file

1. Tick the box *Amount use*.

2. Enter relation to current flexi-field group definition (if applicable).

Example of flexi-field group definition

Setup in Product search configuration

1. Enter the Source column *algarticle_amount_set*.

2. Enter the column name *algarticle_amount_set* in the *All products result* view (list view).

If a flexi-field group definition is used, additional setup is required in **Product search configuration**. Please see documentation related to Product forms for more information.

Form based products in Find products, Purchase request and Order follow-up windows

A form based product is based on a flexi-field group definition, e.g. a form that contains one or several predefined fields. The user is expected to enter additional product information required by the supplier as they create the requisition. The information is included as product text in the Purchase order.
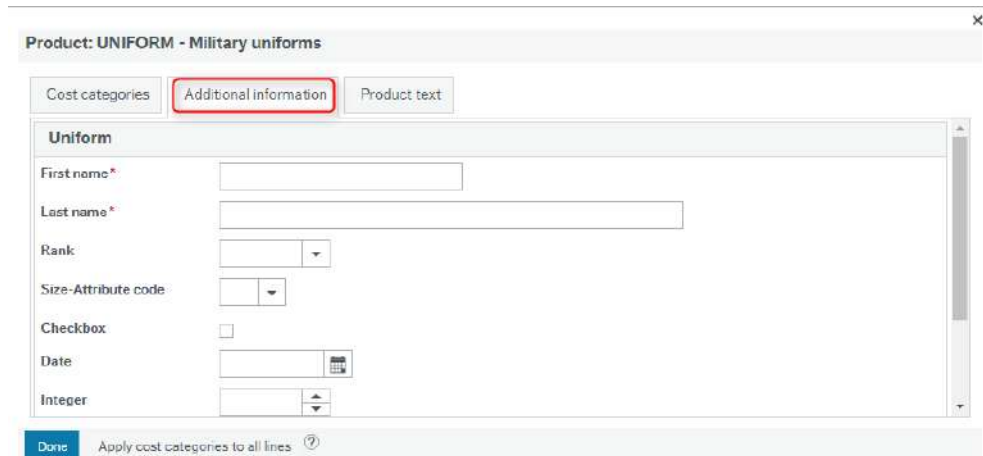
The form products are identified by the 'form icon', which has replaced the **Add to cart** button. The example below shows a form product in **Find products**.
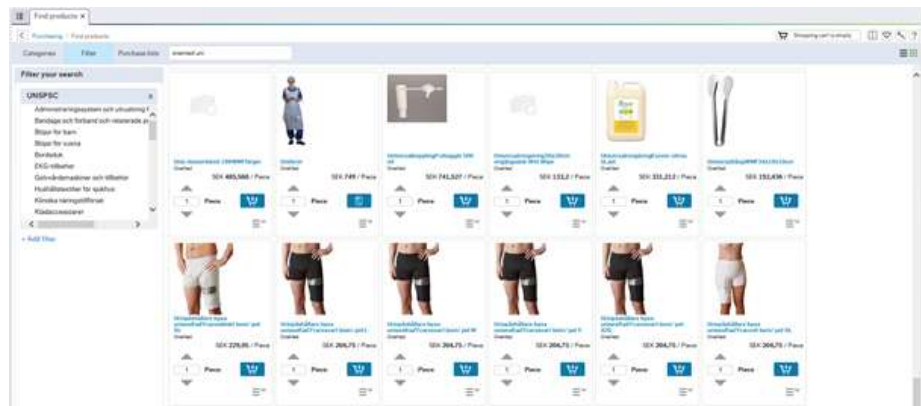
When entering the product details, the product facts and form details become visible. The user adds details to the product with the requested information, in order to facilitate the work of the supplier.
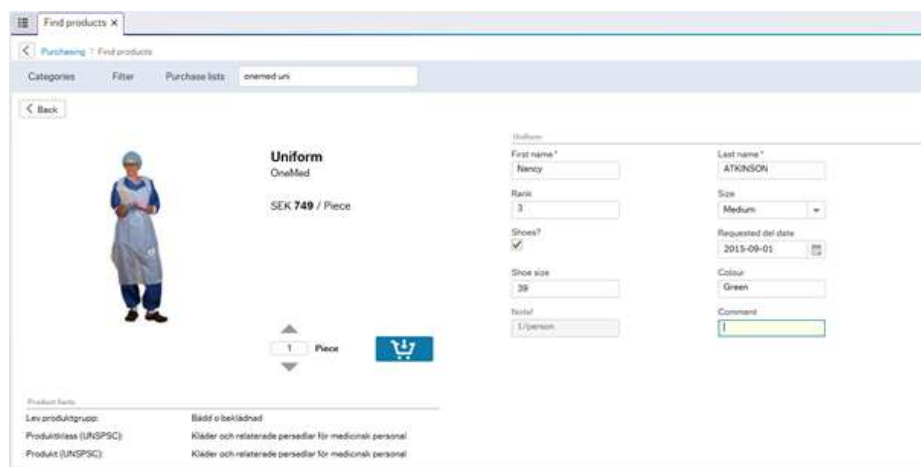
The form data is found in the **Additional information** tab of the current requisition row in the **Purchase request** window.
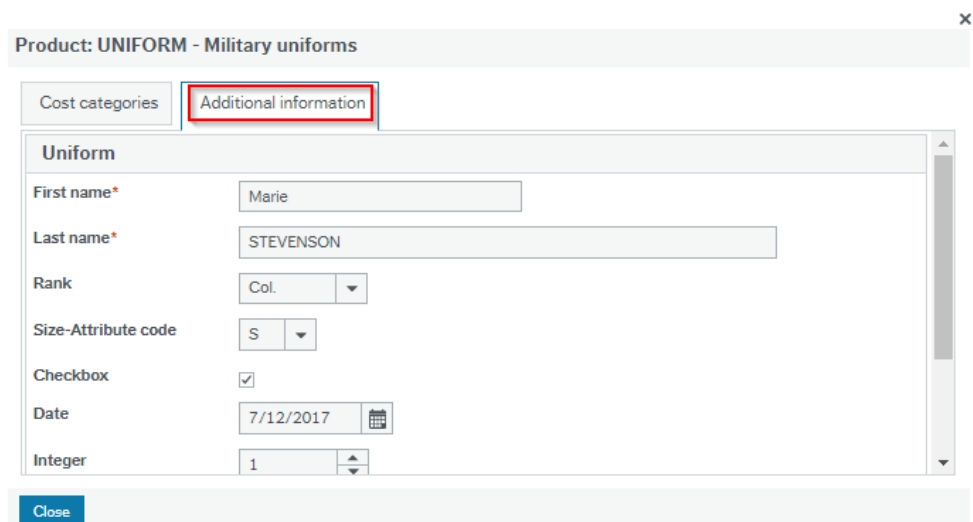
> 📑 Note: From Requisitions 2.0, it is no longer possible to view the additional information in the **Requisition approval** window.

When a Purchase request is transferred to a Purchase order, the form data will also be transferred. The form data can be found on the same row in the **Order follow up** window, in the *Additional information* tab. At this stage the information cannot be changed.

How to set up and use form products in Find products, Purchase request and Order follow-up

To use form products several steps are required:

1. Ensure that any attributes that may be used in the flexi-field group definition exist.
2. Create a current flexi-field group definition (see explanation below).
3. In **Link flexi-field group to table** (TCR038) link flexi-field group to tables.
4. If you want to create a rule, click on *Create relation value rule* (one per table).
5. Then, back in **Link flexi-field group to table** (TCR038), click on the *Connect to rule* field, and select the rule.

Additional information related to the above steps 1-6

Step 2 - Flexi-field group definition

This flexi-field group definition refers to different data types, for example:

- Text fields that are marked mandatory. The user must enter information in the current field, before the product can be added to the cart, see 'First name' and 'Last name'.
- 'Attribute' that generates a drop-down list with current attribute value descriptions in **Find products**, helping the user to select one of the available values. This can also be combined with the 'Default value' tool, minimising the manual effort required by the user.

Thanks to the flexibility of the flexi-field group definition functionality, it is possible to create various useful forms and connect these to products.

Step 3 - Link flexi-fields to tables

1. Go to *Link flexi-field group to table*.
2. Select the necessary table. For Purchase request use Requisition details (*apore-qdetail*) and for Order follow up use Purchase order details (*apodetail*). In this particular example you have Form based products in Purchase request, and

Order follow up window with the fields set up in the flexi-field group.

3. Add at least one flexi-field group, linked to both tables.

Step 4 - Rules

Certain rules can be applied to flexi-field groups so that only a limited number of products have flexi-fields. If no rule is connected to a flexi-field group, all products will be shown in the flexi-field group.

1. Go to *Link flexi-field group to table*.
2. Go to Create relation value rule.
3. Select a rule name.
4. Select Article under Field name.
5. A. Check Via relation. First select the attribute and then the values (products with a relation with the attribute values will show flexi-fields).
    B. Uncheck Via relation. Select the products (products selected will show flexi-fields).

Below is an example of how to set up the rule via relation:

In the example above, the flexi-field group definition is connected to the current product using a relation FLEXIGRP (AI). This means that all products with this relation will be shown in Find products, Purchase request and Order follow up. The fields that will be shown are the ones that have been previously defined in the UNIFORM flexi-field group, as can be seen in the image below.

Below is an example of how to set up the rule, not via relation:

In the example above, users can select specific products. This means that all products selected will be shown in Find products, Purchase request and Order follow-up. The fields that will be shown are the ones that have been previously defined in the UNIFORM flexi-field group.

> Note: In order to have the same experience in Purchase request and Order follow-up, the rules must be defined exactly the same for both.

Limitations

Form products and flexi-fields cannot be saved in a purchase list.

The Product Search Indexing Service

About the Product Search Indexing Service (PSIS)

Introduction

The Product Search Indexing Service (PSIS), builds the three indexed tables that are used for searching products in the **Find products** window:

- Main index table (**Source columns**).
- Attributes table (attribute values related to the products in the main table).
- Text table (language specific texts for the products and related attributes).

The PSIS builds the index tables based on the setup in the **Product Search configuration** window.

The PSIS also configures the web client with:

- Filters
- Categories
- Columns in grid view
- Columns in Product details
- Default sort order
- Free-text search columns.

The PSIS retrieves the data that is defined in the **Source columns** in the **Product search configuration** window. You can also add the following columns:

- Product Master File (Algarticle, apoprice, algunit.).
- Relations on products (algrelvalue).
- Flexi-fields on product (afx*****).

Setup

The PSIS is set up as a timed Process in the Business World On! Management Console. It must run at least once daily in order to transfer data from the **Product master file**, to the index tables:

- Once daily: PSIS execution time = 1440.

The Requisitions Experience Pack is delivered with a default template already set up. It can be changed in **Product search configuration**, but consult a Business World On! expert first.

About categories

Search for products using categories

The categories search is a tree structure enabling you to search for products and services based on predefined categories.
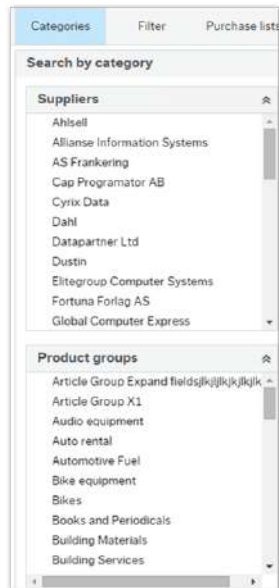
This is helpful if for instance you want to browse products from a specific supplier, or products within a certain product classification category etc., rather than one specific item.

Browse through the categories

- Click current value once to perform a search.
- If there is an arrow available next to the value, it is possible to perform a search on items further down in the structure.
- When you have selected a value in the tree structure, the *Categories* view is automatically replaced by the *Filter* view, in order to enable you to narrow down the search result further.

> Note: The category groups are configurable, therefore they are setup according to each customer's specific requirements. However, the values available in each category group are determined by the information available in the supplier price list that has been imported to the system. Only category group values that contain products are visible in the tree structure, e.g. no blank values are presented.

About purchase lists

Introduction

If there are products you often buy, it can be useful to create a purchase list to make the ordering process more efficient. You can create your own purchase lists that are available to you only. Administrators can create purchase lists that are available to all users. You can see what type of list it is by looking at the icon next to it in the overview. Either **Only me** or **Everyone**. Only people with role PURCH_LISTS_ADMIN_ROLE have the option to create lists available to all.

However, any user can distribute a personal purchase list to one or several colleagues, using the distribution functionality available in the **Purchase list** details window.

You can create new purchase lists either in the **Purchase request** window, or in **Find products**. You can find existing lists in the **Purchase list** tab in **Find products**.

The image below shows purchase lists:

However, you cannot save the following products in a purchase list:

- Products with forms
- Low-ranked products
- External products (from supplier web shop).

Colour indicators

- **Red**- If a product is marked red, the product has expired and it is no longer available to order. Note that these products are not transferred from the purchase list to the shopping cart, and should be removed from the list.
- **Green**- Products that have been added to the shopping cart are marked with a green **Add to cart** button, instead of the regular blue button.

Create a purchase list

1. From the search result list, click the options icon and select **Add to purchase list**.
2. Select **New**.
3. Enter a purchase list name and description.

or

1. From the **Purchase request** window, click **Save as purchase list** to save the content of the current purchase request as a list.
2. Enter a purchase list name and description.

If you want to save the product quantities in your purchase list, untick the box **Save without quantity**.

Select if the list you are creating should be available to everyone, or only you.

> 📝 Note: You must belong to the role that is setup in the PURCH_LISTS_ADMIN_ROLE system parameter to create a purchase list that can belong to everyone.

However, you cannot save the following products in a purchase list:

- Products with forms
- Low-ranked products
- External products (from supplier web shop).

Once the purchase list has been saved, it is available in the **Purchase list** window.

View or change a Purchase list

1. Click on **Purchase lists** in the menu. An overview of purchase lists that are available to you is shown.
2. You can create, maintain and delete your own purchase lists in the **Find products** window.
3. Click on a purchase list to see the details. You can:
   - Change the number of products to be added to the shopping cart.
   - Comment on products (the comments are only visible to you).
   - Remove products from the purchase list, applicable for instance if a product is no longer available to order (marked red in the list).
   - Add one or several products to the shopping cart (only products with quantity 1 or larger are added to the cart).

Update a purchase list

Most changes to a purchase list can be done in the **Purchase list** window, except adding a new product. This has to be added when you select the product from the search result. The table below illustrates this:

What do you want to do?	Updated from Purchase list	Updated from the Search result list
Add a product		X
Update product quantity	X	
Add a comment	X	
Delete products from the list	X	
Delete the purchase list	X	

Add a product to the purchase list

1. Search for the product you want to add.
2. Click the options icon and select **Add to purchase list**.
3. Select the purchase list.
4. Click **OK**.

Distribute a purchase list

1. Select current purchase list.
2. Click **Distribute**.
3. Enter a value in the search field (i.e. name, user id).
4. Click the search icon.
5. Tick current user by clicking it once.
6. Click **Select**.
7. Click **Distribute**.

A message will confirm that the distribution has been made.

If you want to distribute a purchase list to several colleagues simultaneously, use the 'Ctrl' button to mark current values, and then click 'Select' to transfer all values to the column 'Selected users' in bulk.

As a result of the distribution, the purchase list is available for use in the recipients **Purchase list** window. The list automatically inherits the original name. However, it is possible to see if it has been received through distribution, by looking at the description field in the Details section.

About filters

Introduction

When a search result is shown, the filter menu is automatically displayed, to let you narrow down the search result further.

The filters are based on your current search result. Therefore, the next time you perform a search, the available filter values will be adjusted according to existing conditions.

Using the filters

- Select one or several filter values by clicking it once. To remove a filter, click the value again.
- If you want to narrow down the search result further, you can add additional filters by clicking **Add filter**.
    - Select a filter column by clicking it once.
    - Select an operator by clicking it once.
    - Enter value(s).
    - Click **Add** to apply the filter to your search result.
    - The filter remains in the filter pane until you log off **Find products** (it is only temporary).
    - If you want to remove the filter, untick the box next to it.

AND/OR conditions

Note that there is an *AND*-condition between the different filter category criteria, but an *OR*-condition when selecting several values within the filter category.

The **Add filter criteria** window is shown below:

Add filter criteria

Filter column	Operator
Image	equal to
Product description	not equal to
Supplier product	contains
Supplier	does not contain
Price	between
Quantity	less than
Currency	greater than
	empty
	not empty

Value

and

Add   Close

Add filter

About the shopping cart

You can add products to the cart one by one, or in bulk using a purchase list. You can also change the number of products in the shopping cart.

If a product you are adding to the cart has a minimum order quantity accepted by the supplier, a message will inform you that an incorrect quantity has been entered. The same occurs if entering a value that is not a factor of the product increment.

If a product is subject to ranking and it does not have the highest ranking when it is added to the cart, a window will appear requesting you to enter a reason to explain why this purchase is necessary. Please note that product ranking requires additional setup, therefore is not used by everyone.

When a product has been added to the cart, the button **Add to cart** changes colour from blue to green in the search result list, in order to avoid duplicates being added. The cart overview is constantly updated with the current number of product lines, and the total order amount.

The shopping cart is shown below:
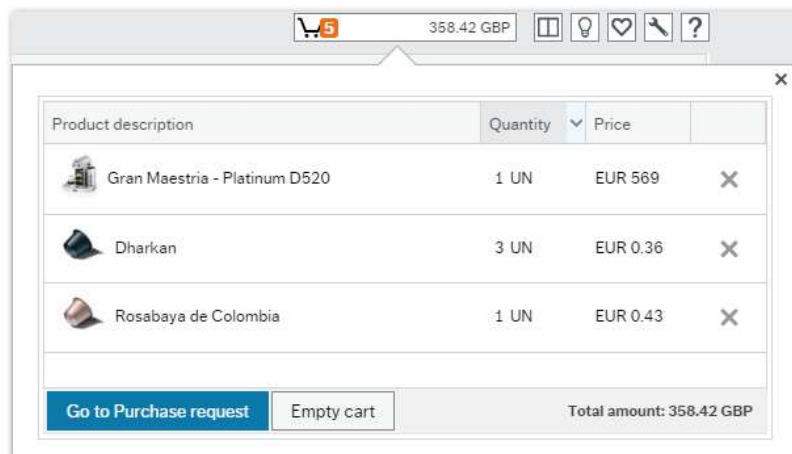
Add a product to the cart

There are several ways to add a product or service to the cart:

- Click on the shopping cart on the current product.
- Drag and drop the product to the cart.

Purchase request

Window usage

This window allows you to:

- enter a purchase request.
- finalise the content of a shopping cart, into a purchase request.

The example below shows the **Purchase request** window with two delivery groups:

If the purchase request is part of a workflow process, it may require approval before the request can be transferred to a purchase order. You can save the purchase request as a draft, if you want to send it for approval later, or delete it. You can find your purchase requests in the process boxes on the start page, grouped according to their order status.

You can toggle between a list view or grid view of your products. Various fields will be available according to the window setup.

If a product you are requesting has a minimum order quantity accepted by the supplier, a message will inform you when you enter the quantity. It will also inform you if the product quantity has an increment by factor.

Order status

You can see the order status when you open the order from the search. An order can have the following status:

- **Draft**- If the purchase request has been saved in draft mode.
- **Awaiting approval**- If the purchase request is on workflow.

Enter a purchase request

1. Give your purchase request a name.
2. Click **Add product**.
3. Enter the product number and quantity.

Finalise the content of an external market shopping cart into a purchase request

When you have been shopping in an external market and click **Checkout**, the **Purchase request** window opens.

1. Check the content of your shopping cart.

   You cannot change the number of products from the external market, but you can add internal products.

2. Click **Find products** if you want to add internal products, or click the corresponding External markets button if you want to continue shopping in another external market.

   > 📝 Note: If you try to go back from the **Purchase request** to the **External market** window using the breadcrumb, your purchase request will be lost.

3. Click **Send for approval** when you are done (or click **Send request** if workflow is not activated).

Delete a product line from your purchase request

- Grid view: click the **Delete** icon on the product line you want to delete.
- List view: tick the box on the product order line that you want to delete.
  1. Click **Delete product**.
  2. A message appears asking if you want to delete the line.
  3. Click **OK** to delete.

Copy product lines in a delivery group

- Grid view: not available.
- List view:
  1. Tick the box on the product order line that you want to copy.
  2. Click **Copy product**.

Move lines between delivery groups

- Grid view: not available.

- List view:
    1. Activate the check box on the product order line that you want to move, from one group to other delivery group.
    2. In the group that you want to move the product order line, click **Move selection here**.

Select a different delivery address

You can have your products delivered to different delivery addresses.
1. Click **Add delivery group** and select the contact that you want the products delivered to.
2. Use drag and drop to move the products between the delivery groups.

Apply the same delivery date for all your products

1. Select your delivery date in the calendar.
2. Click **Apply to all**. This sets the same delivery date for all your products, regardless of delivery addresses.

Select different delivery dates for specific products

1. Check the box of the product that you want to have a different delivery date.
2. Select the date in the calendar.
3. Click **Apply to selection**.

> 📝 Note: You can start by selecting the date first and then the product.

Use Settings to set up default values to all your order lines

1. Click **Settings**.
2. Select the supplier that will be the default supplier for the new lines.
3. Select the default period for your order lines.
4. Select the Cost categories you want to apply to all your new order lines.
5. The *External reference* field is a free text field where you can add comments regarding the purchase.
6. Click **Close**.

> 📝 Note: The *Cost category* may be part of *Cost category hierarchy*, depending on the setup.

Cost category hierarchy

Seq #	Condition	Comment
1	If the category is set to Fixed and a value matrix is entered, use the account rule.	
2	If the category is set to Fixed and a default value is entered, use the account rule.	
3	If any of the cost category attributes are defined as relations to the product, use the relevant relation values.	LG_ART_REL must be activated.
4	If the cost category is set up in the Settings section in the **Purchase request** window, use data from the settings fields.	PQ_ATT_ID_1 to 7.
5	If any of the cost category attributes are defined as the relation between the user/resource, use the relevant relation values.	PO_USER_REL / SO_USER_REL must be activated.
6	If any of the cost category attributes are defined as the relation between the supplier/customer, use the relevant relation values.	LG_APAR_REL must be activated.
7	If a value matrix is entered, use the account rule.	
8	If the account rule has a default value, use this.	

View

Depending on the setup in the options window, various product information fields such as *Warehouse*, *Location*, *Distribution key*, *Period*, *Responsible*, *Supplier product*, *Supplier description* and *Amount*, may be available.

Split cost

This functionality is only available in the list view:

1. Click the 🔍 icon to open the overlay for the product line.
2. In the **Cost categories** tab, you can divide the cost (by spreading the percentage) of the selected row.
3. Click **OK** when you are done.

Add additional information to each order line

This functionality is only available in the list view:

1. Click the 🔍 icon to open the overlay for the product line.
2. In the **Product text** tab you can add additional information in the Product text field.
3. Click **OK** when you are done.

Apply cost categories to all order lines

This functionality is only available in the list view:

1. Click the 🔍 icon to open the overlay for the product line.
2. Click **Apply cost categories to all order lines** if you want your changes to cost categories to be applied to all your order lines.

Amend a rejected purchase request

If your manager has rejected your purchase request, you can amend it and send it for approval again.

You can find your rejected purchase request in **Task management**, and in the **In progress** process box.

1. Click on the rejected purchase request.

   The line that has been rejected is marked in red.

   There may also be a comment stating why the order line has been rejected.
2. Make your changes and click **Send for approval** when you are done.

Perform a funds check

You can check if your purchase request is within your available budget.

Click **Funds check**:

- The purchase lines that are within budget are marked green.
- A yellow triangle means a warning (depending on the setup).
- A red exclamation mark (!) means that the budget is exceeded.

The funds check is also performed when the user clicks **Send for approval** (or **Save** depending on the workflow setup).

"About the Funds check" on page 76

Save as purchase list

1. Click **Save as purchase list** to save the content of your purchase request as a list.
2. Enter a purchase list name and description.

If you want to save the product quantities in your purchase list, untick the box **Save without quantity**.

Select if the list you are creating should be available to everyone, or only you.
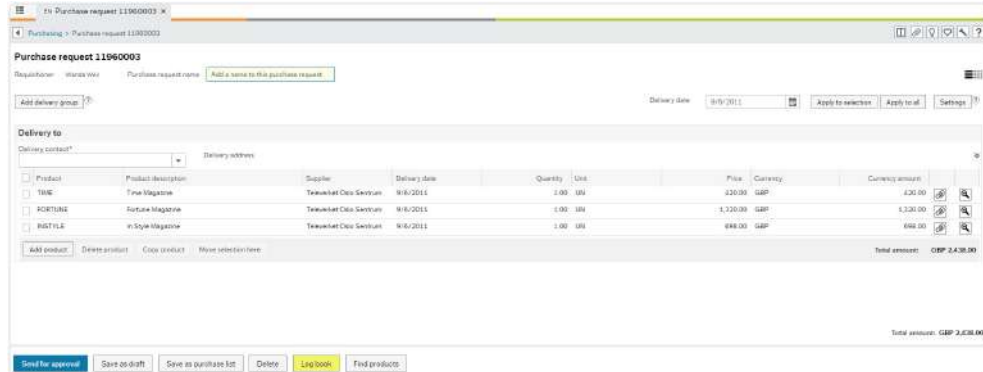
> 📋 Note: You must belong to the role that is setup in the PURCH_LISTS_ADMIN_ROLE system parameter in order to create a purchase list that can belong to everyone.

Once the purchase list has been saved, it is available in the **Purchase list** window in **Find Products**.

View the Log book

> 📑 Note: In new purchase requests, the **Log book** button will be deactivated until you perform an action for the purchase request (i.e. *Save as draft*).

1. Click on the **Log book** button.

2. Select the line with the workflow in progress, and click **Zoom**.

3. Click **Search** for details.

You will see the requested details as follows:

📄 Note: You can choose which columns are displayed or not, by clicking the **Choose columns** command.

Fields and buttons

📄 Note: Only *Delivery address* and *Delivery description* will be part of the consolidation process when the system parameter PO_CONSOLIDATE is active.

Fields	Explanation
Requisitioner	ID and name of the person registering the purchase request.
SupplierID	The product supplier's ID as it is registered in the supplier master file.
Period	Valid period for the purchase request. Current period is default.
Purchase request name	Text field where you can give a name to identify the purchase request.
External reference	Text field for any external reference.
Delivery contact	List containing contact people for a selected supplier.
Delivery address	The address where the products are to be delivered.
Delivery description	This is a free text field where you can enter a description about the delivery, such as which floor it should be delivered to, the specified time of delivery, etc. Maximum 120 characters.
Delivery attention	This is a free text field where you can enter additional text, maximum 255 characters.
Delivery information	This is a long, free text field where you can enter information about the delivery. Maximum 3900 characters.

Fields	Explanation
Product	The product code.
Product description	The description retrieved from the product master file.
Supplier	The name of the supplier.
Unit	The default stock unit code for the product.
Delivery date	The delivery date. The default value is taken from the header information.
Currency	The currency to be used.
Price	The unit price in the selected currency. Default price is the order purchase price, or contract price, defined for the product.
Amount	Sum amount for this product in the company currency. Calculated as *Number* multiplied by *Price* in company currency, minus *Discount*. This field is hidden by default.
Total amount	The total amount in the company's currency.
	Allows you to attach documents to the product line. The colour of the icon changes when a document is added to the product line.
Warehouse	The warehouse associated with the product. This field is hidden by default.
Location	The warehouse location. This field is hidden by default.
Distribution key	The distribution key for spreading costs you want to apply to this purchase request. This field is hidden by default.
Product text	Text field where you can enter a text for each product line.
Currency amount	The currency amount, not editable. This field is hidden by default.
Supplier product	The supplier product code which is registered in the Purchase price table. This field is hidden by default.
Supplier product description	The supplier's description of the product. This field is hidden by default.

Buttons	Explanation
Add delivery group	You can have your products delivered to different delivery addresses. You can select a different delivery address for one or several products based on the delivery contact.
Apply to all	This sets the same delivery date for all your products, regardless of delivery address.
Apply to selection	Use this button when you want one or more products to have a different delivery date, even if they are in different delivery groups. Choose the product and select the delivery date in the calendar, and then click this button.
Settings	Use **Settings** to select default values for all order lines for your purchase request. These values can be set as default: • Supplier • Period • Cost categories. The *External reference* field is a free text field where you can add comments regarding the purchase.
🔍	Opens the overlay where you can add product text and split cost.
Split cost	You can divide the cost (by spreading the percentage) of the selected row.
Apply cost categories to all order lines	This button lets you copy the cost categories to all the order lines.
Add product	Click this button to add a product to your purchase request.
Delete product	This deletes the marked product line. If the line belongs to an existing purchase request. The line will remain in the database with status **Closed**.
Copy product	This copies the marked product line to the same delivery group.

Buttons	Explanation
Move selection here	Move the selection (selected lines) from the origin delivery group, to the destination delivery group. Note that the buttons will be disabled until a line is selected in a different group, other than the active one.
Send for approval / Send request	If workflow is implemented, the **Send for approval** button sends the purchase request to your manager for approval. If workflow is not implemented then the **Send request** button sends a request without workflow.
Save as draft	Saves the purchase request as a draft. Once you save as draft, the screen will stay in the **Purchase request** window with the current request opened. You can also find it in the Draft process box.
Save as purchase list	Use this button to save the content of the current purchase request as a list. Enter a purchase list name and description. You will find saved purchase lists in the **Purchase lists** tab in **Find products**.
Delete	Deletes the purchase request. The purchase request will remain in the database with the status **Closed**.
Log book	Shows the workflow log steps. In other words, it allows user to know who is the person responsible for approving the purchase request.
Find products	This button opens **Find products** so you can continue to shop for internal products.
Funds check	You can perform a funds check on your purchase request to see if it is within your budget: • Green icon - The order line is within your budget. • Yellow icon - Warning. This is depends on the setup. • Red icon - Budget is exceeded.
External markets	If there are many External markets setup, they will be grouped in the External markets button.

About the Funds check

Funds check status

You can perform a funds check on your purchase request to see if it is within your budget.
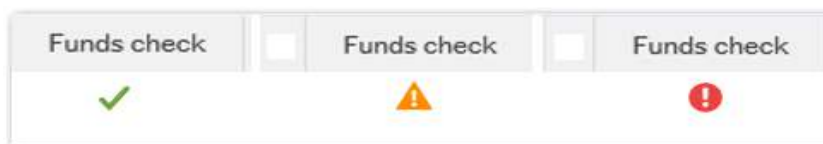
- Green icon - The order line is within your budget.
- Yellow icon - Warning. This is depends on the setup.
- Red icon - Budget is exceeded.

The funds check is connected to the Commitment Accounting module, and checks the purchase against the budget so that the request can be stopped if the budget is exceeded. You get a warning when there is little budget available.

The Fund check is also performed when you click **Send for approval** (or **Send request** depending on the workflow setup).

Prerequisites for using funds checking

- The Planner module must have a budget.
- System parameter CO_USE_FUNDS_CHECK must be ativated.
- System parameter CO_FUNDS_CHECK_IGNORE (if activated, must not contain the value REQ).

Using the document archive

In the **Purchase request** window, you can use the document archive functionality and add a document to the activity menu. You can also add a document to the individual product order line so that other users can easily checked the attached information.

The documents can also be transferred from Purchase request to Purchase order. Note that it is necessary to add new rows in the system setup value PO_DOC_TRANSFER.

XML export to the supplier

Documents that are transferred or added in the Purchase order can be exported through the order xml, so that they can be sent to the supplier. Please note that it is necessary to add two new rows in the PO_DOC_SUPPLIER system setup value screen. The first row is for general documents attached to the order, and the second row is for documents attached to the order line.

Attach a document to the Purchase request window

1. Click on 📎 in the activity menu and the **Documents** window opens.
2. Click **Add a document**.
3. Select from the drop-down the document type or category that your document belongs to.

4. Click **Upload** and select your document.

5. Enter a text description of your document.

6. Click **Save**.

7. Close the window.

The document is saved and the corresponding document archive icon will be highlighted.

Attach a document to the product line

1. Click ⬚ in the product line and the **Documents** window opens.

2. Click **Add a document**.

3. Select from the drop-down the document type or category that your document belongs to.

4. Click **Upload** and select your document.

5. Enter a text description of your document.

6. Click **Save**.

7. Close the window.

The document is saved and the corresponding document archive icon will be highlighted.

> 🗏 Note: The document archive functionality must be activated in the Document type window (TDS010).

Setup for document archive

Introduction

The procedure below is necessary in order to attach a document to an order line in the **Purchase request** window, and have it transferred to the purchase order.

Setup for document archive in the Purchase request window

Activate the document archive functionality using the **Document type** window.

Document type

Document type | **Data entry** | Indexes | Access

Lookup
REQLINE
Requisit...

Enable data entry
☐

Data entry options

Element type
[▼]

◉ Enable for loaded documents only
○ Enable for all documents

◉ Manual data entry using window
○ Automatic data entry using server process

Server process options

Variant
[▼]

◉ Get header data from indexes
○ Get header and detail data from XML

Document type

Document type | Data entry | **Indexes** | Access

Lookup
REQLINE
Requisti...

Document type indexes

	#	Description	Map data	Attribute	Data type	Data length	Flag	Enter default value	Default value	Bar code	Allow parked ...	Allow closed ...
☐	1	Client		Client Code (CLIENT)	Text	25	Mandatory		:client	☐	☐	☐
☐	2	OrderNo			Large integer	15	Allocated			☐	☐	☐
☐	3	LineNo			Small integer	4	Allocated			☐	☐	☐

Add | Delete

You also need a System setup value like the one below:

System setup values

Selection criteria

System setup *
EN

Load

System setup values

	#	Name	Position	Text 1	Number 1	Text 2	Number 2	Text 3	Number 3	▲ Description
		PO_DOC*								
☐	1	PO_DOC_SUPPLIER	0	PO	0	0	0	EN	0	To sent to supplier header documents via XML
☐	2	PO_DOC_SUPPLIER	1	POLINE	0	0	0	EN	0	To sent to supplier the line documents via XML
☐	3	PO_DOC_TRANSFER	0	REQ	0	PO	0	EN	0	To transfer documents from Requisition header to Purchase orde...
☐	4	PO_DOC_TRANSFER	1	REQLINE	0	POLINE	0	EN	0	To transfer documents from Requisition lines to Purchase order li...

When the server processes **PO19 Requisition transfer proposal / PO18 Requisition transfer confirmation** converts the purchase request to a purchase order the attached documents are also transferred.

When you want to send a purchase order, you must run the **PO01 Purchase order printout** server process in Business World On! Desktop. This report prints new orders that can be sent out to the relevant suppliers. The report also sets the status of these orders to Ordered (O).

If you click the **Print purchase order** button, the parameters in **PO01 Purchase order printout** will automatically receive the default values from the current order (for example number type, order number). The server process is then set up so that only the active purchase order is printed. The default values can be changed if necessary.

XML version

PO01 Purchase order printout takes the attachments in Business WorldOrder.xml if you run xml version:

http://services.Business World.com/schema/Business WorldOrder/2011/11/14

Using on behalf of requisitioner

In Purchase request you can raise a purchase on behalf of another requisitioner.

To do this, select the requisitioner from the list.

The list of people is predefined by Data Control.

Setup

Depending on the **System setup values** the Requisitioner field will appear with a dropdown or read only.

By default, creating purchase request on behalf of other resource will be active so the field will be a mandatory with type ahead and dropdown. In case you want that Requisitioner to be the resource who is connect to the logged in user (read only), then you will need to add the values like in the picture below.

LOGGED_IN_USER_ONLY in XPQ5 (Procurement > Purchasing > Purchase request), and XPQ10 (Your employment > Purchasing > Purchase request).

> 📄 Note: In order to configure Data Control, please refer to the Data Control Reference Manual (Fundamentals).

Order follow up

Window usage

You can use this window to:

- Create an order confirmation based on a Purchase order, by entering manual changes.
- Follow up a purchase order which has been sent to the supplier, and receive changes through the **Import of order confirmation** (LG04) process. You can see more details about changes using the **Order confirmation history** button.
- See Purchase order details.

Depending on the workflow setup, after an order has been changed, it will be sent for approval in the **Order confirmation approval** window. The changes will be visible in **Order follow up**, regardless of whether workflow is activated or not. It will be updated on the purchase order when the server process **PO20 Order confirmation update** is updated.

Order information

The order information is available in the right side panel and shows the following:

- *Order number* - This field is hidden by default in Window options.
- *Changed by* - Who did the last change on the order. The values can be **User ID** or **Changed by supplier** (usually for imported orders from **LG04 Import of order confirmation**).
- *External reference* - The supplier reference.

- *Order acknowledgement* - This shows whether the order has been acknowledged by the supplier or not.
- *Responsible* - The person responsible for the order.
- *Requested by* - The person who registered the purchase request.
- *Confirmation date* - The date when the order was confirmed.
- *Order date* - The date of the purchase order.

Delivery to information

All delivery details are shown in the **Delivery to** section and shows the following:

- *Delivery contact* - The suppliers contact person.
- *Delivery address* - The address where the products are delivered.
- *Delivery description* - If the user has entered extra information in the **Purchase request** window, it is shown in this field. The field is visible and editable by default. By using the options window, you can change the setup e.g. to mandatory or read-only.
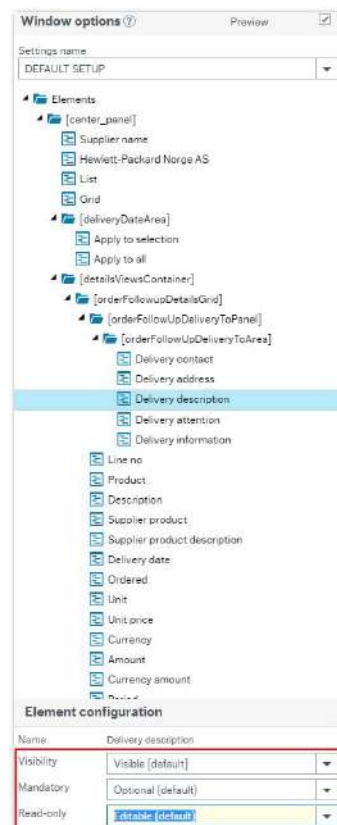
> Note: If the order is on workflow, the *Delivery description* field will not be editable.
>
> Also, if you make a change only in the *Delivery description* field and you send your order for approval, note that if the workflow is activated, no workflow task will be created. However, the modification will be saved both before and after running the PO20.

- *Delivery attention* - If the user has entered extra information in the **Purchase request** window it is shown in this field. This field is visible by default.
- *Delivery information* - If the user has entered extra information in the **Purchase request** window it is shown in this field. This field is visible by default.

Line details information

When any detail of an Order that is in **Sent** status is modified, when you re-open the **Order follow-up** window the *Supplier feedback* column will be displayed with the following values:

- **Changed** - If there is a change to the original line.
- **Cancelled** - When the *Ordered* column value is 0 and the *Amount* column value is 0.
- **Confirmed** - If there are no changes from the supplier.
- **New** - If there is no original line to compare with.

Furthermore, the window title will change to **Order confirmation** (XX), follow up and the text of the fields that have been modified will be highlighted and in bold. Also, the original line will be shown below the modified line, so you can detect the changes at a glance. To view the original line, click on the **Expand/collapse** ⊞ button.

> Note: You can also Expand all / Collapse all from the column header.

It is possible to have changes in hidden columns. In this case, a warning message will be displayed at the bottom of the screen, and a warning icon will indicate which line the message is referring to.

If you want to show the hidden columns, you have to make them visible using the **Window options** setup. In order to display them correctly, save and distribute your new setup and then remember to refresh your screen.

📝 Note: As a good practice, any modification in Window options 🔧, needs a screen refresh.

Also, if the *PO20-Order confirmation update* has been run, then the Order is updated retrieving the modified values. As a result, the modified fields will no longer be high-lighted or in bold, and the original line will no longer appear.

Order status

You can see the order status when you open the order from the search. An order can have the following status:

- **Sent** - The order has been sent to the supplier and is not fully received.
- **Confirmed** - The order has been confirmed by the supplier, but not fully received. Note that Confirmed order confirmations cannot be modified, until the order has been updated. When the order has been updated, the Confirmed order confirmation can be modified.
- **Cancelled** - The whole order has been cancelled by the supplier. Note that Cancelled order confirmations cannot be modified. After updating the order, the original Purchase order will be closed and will no longer be available.
- **Sent** + **Awaiting approval** or **Confirmed** + **Awaiting approval** - If the order is in workflow you will see a combination of the statuses.

📝 Note: The order can be awaiting approval from different workflow processes, i.e. Purchase order approval or Order confirmation approval.

Get more information about the Supplier

- Click on the supplier name link.

Update a purchase order after it is sent

1. You can make changes to the following fields on the order:
   - *Description*
   - *Amount ordered*
   - *Unit price*
   - *Delivery date*
   - *Amount*.
2. Click **Send for approval**.

   Depending on the setup, the changed order can be sent on workflow for approval.

Select different delivery dates for specific products

1. Check the box for the product that you want to have a different delivery date.
2. Select the date in the calendar.
3. Click **Apply to selection**.

   📝 Note: You can start by selecting the date first and then the product.

Apply the same delivery date for all your products

1. Select your delivery date in the calendar.
2. Click **Apply to all.** This sets the same delivery date for all your products, regardless of delivery addresses.

Cancel one or more order lines

1. Select the order line or lines you want to cancel, and click **Cancel selected lines.**
   This sets the quantity and amount to 0.
   For *Amount use products* the unit price will be set to 0 and not the quantity.
2. Click **Save**.

View additional information for each order line

1. In the list view in Additional information, click 🔍 .

   An overlay opens where you can view details about the cost categories and Additional information for the Forms based products of the row.
2. In the grid view click on the product card.

   The overlay **Your product details** opens, where you can see details and cost categories related to your product.

View Order confirmation history

Click **Order confirmation history** and a window opens where you can view details of the order confirmation history.

View the Log book

1. Click on the **Log book** button.

2. Select the line with the workflow in progress and click **Zoom**.

3. Click **Search** for details.

You will see the requested details as follows:

Note: You can choose which columns are displayed or not, by clicking the **Choose columns** command.

Fields and buttons

Fields	Explanation
Supplier name	The name of the supplier. Open the supplier master file for more information about the supplier.
Delivery date	The date the delivery is scheduled to arrive.
Delivery contact	Contact address for the delivery.
Product	The product identification.
Description	The product description.
Delivery date	The date of delivery.
Ordered	The number of ordered units.
Unit	The base unit of the product.
Unit price	The unit price.
Currency	The currency code e.g. NOK, USD etc.
Amount	The order row amount in the company currency.
Currency amount	The amount in the chosen currency.
Total currency amount	The total currency amount for the order.
Changed by	The name of the user who last changed the order.
External order ID	The supplier order reference number.
External reference	The supplier reference.
Order acknowledgement	Shows whether the order has been acknowledged by the supplier or not.
Responsible	The person responsible for the order.
Requested by	The person who registered the purchase request.
Order date	The date of the purchase order.
Confirmation date	The date the order was confirmed by the supplier.
Line No.	The line number within the order. This field is hidden by default in Window options.
Supplier product	The supplier product code which is registered in the Purchase price table. This field is hidden by default in Window options.
Supplier description	The supplier's product description. This field is hidden by default in Window options.

Fields	Explanation
Period	The accounting period the order will be posted to. This field is hidden by default in Window options.
Disc%	The discount in percent. This field is hidden by default in Window options.
Discount	Discount in currency. Calculated from Disc percent. This field is hidden by default in Window options.
Status	The status of the order line.

Buttons	Explanation
Apply to selection	Use this button when you want one or more products to have a different delivery date. Choose the product and select the delivery date in the calendar and then click this button.
Apply to all	This sets the same delivery date for all your products.
Cancel selected lines	Select the order line or lines you want to cancel, and click Cancel on selected lines. This sets the quantity and amount to 0. For *Amount use products* the unit price will be set to 0 and not the quantity.
Save	This button is only available if workflow is not implemented or Parked. This button saves the order.
Send for approval	This button is only available if workflow is implemented and Active. This button submits the order confirmation details to workflow for approval.
Order confirmation history	This button opens the **Order confirmation history** window.
Log book	This button shows the workflow logs steps, i.e. allows user to know who is the person responsible for approving the purchase request.

Using the document archive

In the **Order follow up** window you can use the document archive functionality, and add a document to the activity menu. You can also add a document to the individual product order line, so that other users can easily check the attached information.

Attach a document to the Order follow up window

1. Click on in the activity menu and the **Documents** window opens.
2. Click **Add a document**.
3. Select from the drop-down the document type or category that your document belongs to.
4. Click **Upload** and select your document.
5. Enter a text description of your document.
6. Click **Save**.
7. Close the window.

The document is saved and the corresponding document archive icon will be highlighted.

Attach a document to the product line

1. Click in the product line and the **Documents** window opens.
2. Click **Add a document**.
3. Select from the drop-down the document type or category that your document belongs to.
4. Click **Upload** and select your document.
5. Enter a text description of your document.
6. Click **Save**.
7. Close the window.

The document is saved and the corresponding document archive icon will be highlighted.

> Note: The document archive functionality must be activated in the Document type window (TDS010).

Setup for document archive

Introduction

The procedure below is necessary in order to attach documents to the header and lines level in the **Order follow up** window.

Setup for document archive in the Order follow up window

Activate the document archive functionality using the **Document type** window.

Document type for header level

Document type for lines level

Manual changes in order follow up

The **Order follow up** window lets you make changes to the purchase order. These changes become part of Order confirmation, because you need to resend the order to the supplier. Therefore, if you make changes in **Order follow up**, the *Changed by* field will always be = **Username**.

Order follow up is also used to open an order confirmation (imported through XML). In this case, when you open an order confirmation the *Changed by* field will be = **Supplier**. However, if you make changes, the *Changed by* field will be = **Username** (because you have introduced changes in the Supplier order confirmation, you will need to resend the order).

Examples of status changes

No discrepancy

If there is no discrepancy between the order and the order confirmation, the order confirmation will be automatically approved and the Changed by field will be = Supplier. **PO20 Order confirmation update** will update the header status of the order to **Confirmed** (status = **A**), and update lines with any changes.

Initiated by supplier without changes in the approval step

If workflow is activated and the order change has been initiated by the supplier (and the changes have been approved in workflow), the server process **PO20 Order confirmation update**, updates the header status of the order to **Confirmed** (status = **A**), and also updates the lines with any changes.

Initiated by supplier with changes in the approval step

If workflow is activated and the order changes have been initiated by the supplier, and it has also been changed in workflow, approval process **PO20 Order confirmation update** updates the header status of the order to **Ordered** (Status = **O**). It also updates the lines with any changes.

Initiated by user with or without changes in the approval step

If workflow is activated and the order change has been initiated by the user (and the changes have been approved in workflow), **PO20 Order confirmation update** updates the header status of the order to **Ordered** (Status = **O**), and updates the lines with any changes.

If workflow is deactivated and the order change was initiated by supplier, **PO20 Order confirmation update** updates the header status of the order to **Confirmed** (Status = **A**), and updates the lines with any changes.

If workflow is deactivated and the order change was initiated by a user, **PO20 Order confirmation update** updates the header status of the order to **Ordered** (Status = **O**), and updates the lines with any changes.

Interaction diagrams

Interaction diagram if changes have been initiated by the users

OFU – Order follow up | OC – Order confirmation | PO- Purchase order | WF – Workflow | PO020 – Order confirmation update

Interaction diagram if changes have been initiated by the Supplier

OFU – Order follow up | OC – Order confirmation | PO- Purchase order | WF – Workflow | PO020 – Order confirmation update
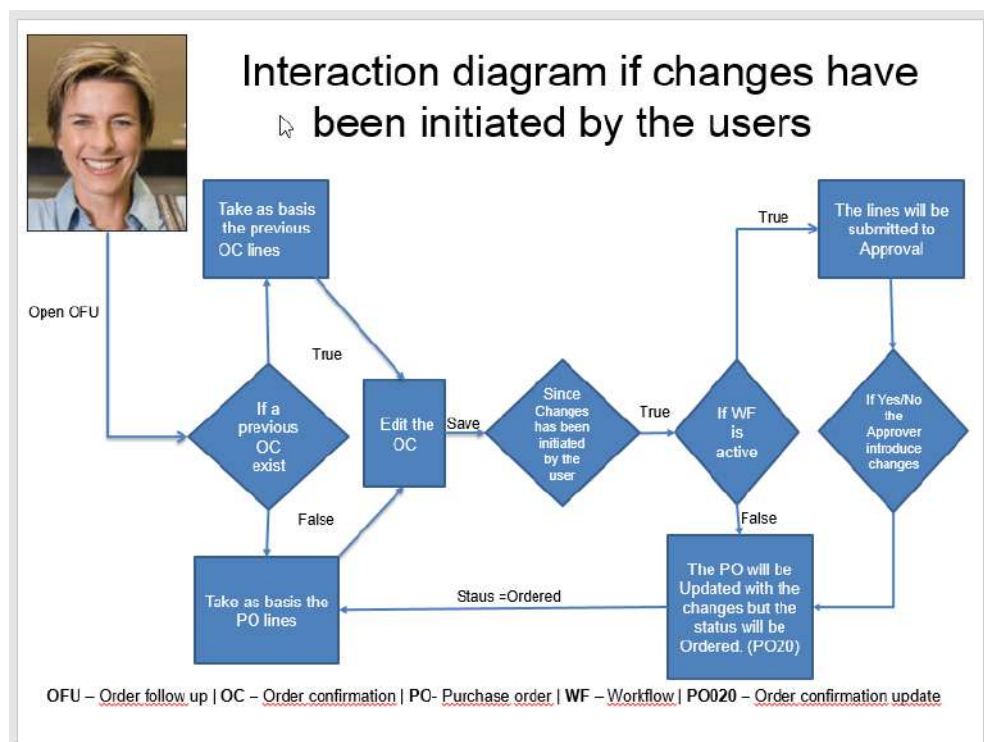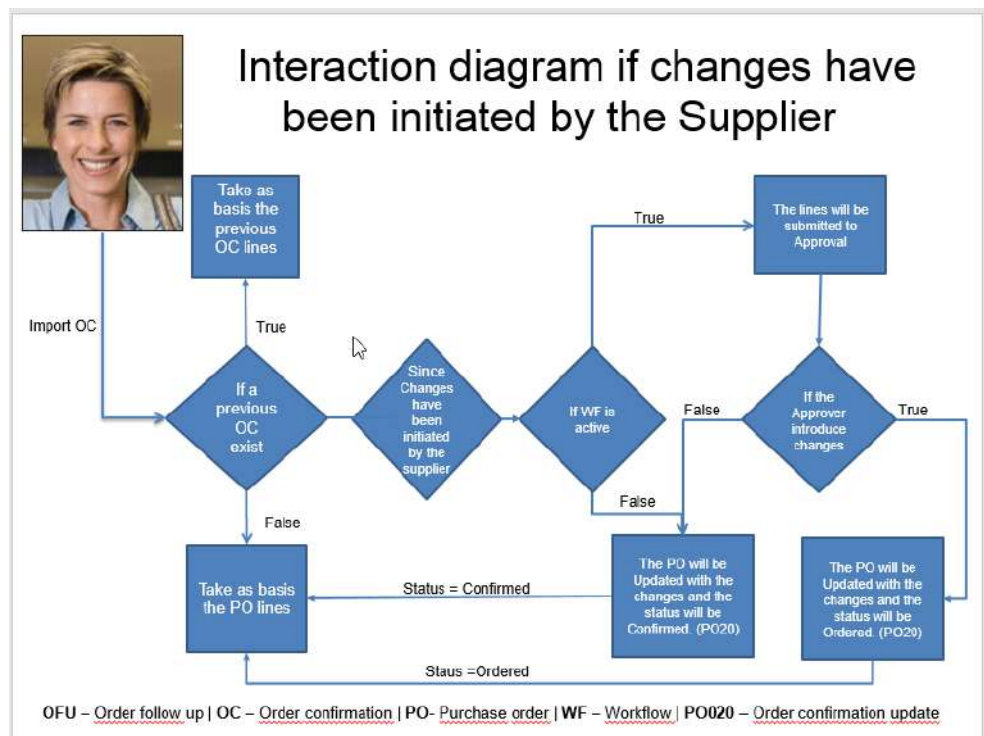
📋 Note: If you choose to use Manual order confirmation, it is highly recommended that you Confirm all product lines. If all product lines are not confirmed, this could lead to unknown conflicts in the Order follow up screen.

External market places

About external market places

The Requisitions Experience Pack is compatible with external market places on the Internet. You can access these from the Launching page or from the **Purchase request** window, and order products from the market place and automatically get the order details back into Business World On!.

Once you choose **Express Checkout** from the external market, you are automatically redirected to the **Purchase request** window.

You can continue shopping in the external market place from the **Purchase request** window by clicking on the corresponding external markets, like in the example above.

> Note: If you try to go back from the **Purchase request** to the **Marketplace** window using the breadcrumb, your purchase request will be lost. A warning message will pop up to advise the user.

Prerequisites for using an external market place

The Business World On! Customisation Tools (ACT) module must be installed, and the default and setup values are handled by each ACT implementation.

The following system parameters must be activated:

- LG_PUNCH_OUT_DEFAULT_SITE
- LG_PUNCH_OUT_ENABLED
- LG_PUNCH_OUT_ENTRY_POINT
- PO_POSTBACK_PRODUCT (optional).

See the External market place system parameter descriptions for more details.

In addition you will also need to setup the **External system master file** (see the Business World On! online help for details).

LG_PUNCH_OUT_DEFAULT_SITE (LG)

Purpose

This system parameter must be set to the default market place.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/off
	150	☐

LG_PUNCH_OUT_ENABLED (LG)

Purpose

This parameter is used to enable or disable the Punch out tab in the Requisition entry window:

☒	The Punch out tab in the Requisition entry window is enabled.
☐	The Punch out tab in the Requisition entry window is disabled.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/off
	1	☐

LG_PUNCH_OUT_ENTRY_POINT (LG)

Purpose

This parameter is used to identify the Business World On! component that should initiate the external market place.

The parameter must contain the URL, pointing to the Business World On! Punch out component, for example:

http://<myWebServer>/<Business World>/ReqPunchOut.aspx

or

Custom/ReqPunchOut.aspx

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/off
Custom/ReqPunchOut.aspx	150	☒

PO_POSTBACK_PRODUCT (PO)

Purpose

This parameter is used in connection with postback of requisitions. When a requisition is returned from a punchout, the product codes from the external web site are put into the supplier *Product* code field. This means that the **Products** master file does not have to be maintained with all the products from the third party web site.

Value
A valid product code (article_id), such as DUMMY or 1000, is used for rows added to the **Requisition Entry** window, after they have been punched out and posted back from a third party web site.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/off
DUMMY	25	☐

System parameters

LG_NO_OF_DECIMALS

Purpose

This system parameter enables the user to define prices to more than 2 decimal places in the **Purchase request** and **Order follow up** windows.

The value is the number of decimals you require.

Settings

☒	The number of decimal places specified in the *Value* field is used.
☐	The default of 2 decimal places is used.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/Off
2	1	☒

PQ_ANALYSIS_CTRL

Purpose

This system parameter is used to activate or deactivate if a purchase request is validated against the account rules in the **Purchase request** window.

Settings

☒	The **Purchase request** entry window validates the purchase request against the account rule for the account used.
☐	No validation is made. If the user wants validation to occur in the **Requisition approval** window, then they must select *Validation according to account rule* in the Requisition workflow process definition.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/Off
	4	☐

PQ_ONLY_SHOW_CONFIRMED_PO

Purpose

This system parameter specifies if only purchase orders with order status **Confirmed** will be shown in the expected deliveries calendar.

Settings

☒	Only purchase orders with order status **Confirmed** will be shown in the expected deliveries calendar.
☐	Purchase orders with order status **Ordered** and order status **Confirmed**, will be shown in the expected deliveries calendar.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/Off
		☐

PQ_REQ_SUP_ART

Purpose

This system parameter is used in the **Purchase request** window, and it determines whether the user sees the *Product* and *Product description* or, *Supplier product* and *Supplier product description*, when using grid view.

Settings

☒	The user will see the *Supplier product* and *Supplier product description* in the grid view.
☐	The user will see the *Product* and *Product description* in the grid view.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/Off
	1	☐

PURCH_LISTS_ADMIN_ROLE

Purpose

This system parameter specifies the RoleID needed to save and make changes to global purchase lists, in the **Purchase request** and **Find products** windows. The parameter is by default activated with value **SYSTEM**. A user must have the **SYSTEM** role in order to administrate global purchase lists.

Standard setup

Business World On! is delivered with this standard setup:

Value	Max length	On/Off
SYSTEM	25	☒