Infor LN Procurement User Guide for Purchase Requisition Workbench

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About this document

This document explains the process to use the Purchase Requisition Workbench, which provides easy access to all the information required to convert requisitions to RFQs or purchase orders. The layout, navigation, user settings, and features of the workbench are also detailed.

Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the Infor LN functionality will help you understand this guide.

References

Use this guide as the primary reference for the purchase requisition workbench. Use the current editions of these related references to research information that is not covered in this guide:

- *User Guide for Purchase Requisitions U9820 US*
- *User Guide for Requests for Quotation (RFQs) U9821 US*
- *User Guide for Purchase Orders U9824 US*

How to read this document

This document is assembled from online Help topics. Text in italics followed by a page number represents a hyperlink to another section in this document.

Underlined terms indicate a link to a glossary definition. If you view this document online, clicking the underlined term takes you to the glossary definition at the end of the document.

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Chapter 1
Purchase Requisition Workbench

Introduction to Purchase Requisition Workbench

You can use the purchase requisition conversion workbench to support the requisition process. The workbench provides easy access to requisition information and accelerates the process of converting a requisition to a purchase order or request for quotation.

Purchase requisitions originate from different sources, that is manually, internally, or externally.

Positioning

This workbench is positioned along with the purchase requisition sessions in Procurement.

Launching the Workbench

To access this Purchase Requisition Conversion Workbench (tdpur8360m000) workbench, go to **Procurement > Purchase Requisitions > Requisition Conversion Workbench**.

Note

- When you access the workbench for the first time, the buyer-related data, specific to the user, is populated. You can specify the buyer in the Purchase User Profiles (tdpur0143m000) session.
- Only approved requisitions are populated for the selected buyer.
- The site of the Purchase Office is displayed if the **Sites** field is set to **Active** or **In Preparation** in the Implemented Software Components (tccom0500m000) session.
- Workbench supports LN Authorizations and DEM Browser Settings.

Layout

The workbench comprises of the following:

- Toolbar section: This section displays various options available for the users such as Save, Revert, Filter and so on. The section also enables you to view the requisition lines in a Grid view or Card view. The user setting option is available to set the default/personalized layout. For more information, refer to Service inspections and preventive maintenance scenarios.

- Requisition Lines section: When the workbench is accessed, all the data related to the requisition line such as Due Date, Due Days, Source/Supplier, and Conversion Type is populated. The user can view the requisition lines in a Grid view or Card view.

- Message Section : This section displays error and warning messages and information related to conversion.

Chapter 2
Toolbar and Icons

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Workbench Navigation

Toolbar

This section is used to save, refresh, revert, convert and filter the data.
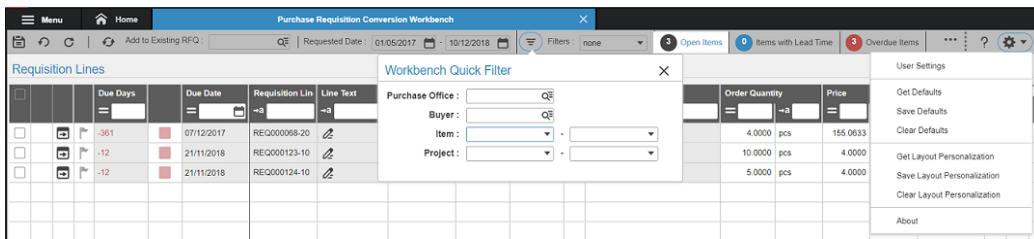
The details of the various options used are as follows:

- Save: Submits the workbench changes to Infor LN.
- Revert to Saved: Reverts the changes made to the selected requisition lines.
- Refresh: Updates the purchase requisition lines from the Infor LN.
- Convert: Converts the selected requisition lines to purchase order or purchase requisition based on the value set in the Conversion Type column.
- Add to Existing RFQ: Adds the selected RFQ Lines to the existing RFQ Order. An information message is displayed in the Workbench message pane after the converted lines are added to the specified RFQ . Note: The Conversion Type field must be set to RFQ for all the selected RFQ lines to be added to an existing RFQ.
- Requested Date: This field is used to filter the data based on the date of request of the purchase requisition. Based on the requisition filter, the requisition lines are displayed.
- Filters : You can click the Filter icon to access the Workbench Quick Filters. You can filter the data based on:
  - Purchase Office: The purchase office to search the requisition lines.
  - Buyer: The buyer to search the requisition lines.
  - Item: The range of items to search the requisition lines.

- Project Range: The range of projects to search the requisition lines.
- Personalized Filters: The users can define the filter based on the requirement.
- Open Items: Displays the number of open requisition lines. When you click this button, the requisition lines are filtered based on the open items.
- Items with Lead Time: Displays the number of requisition lines with lead time. When you click this button, the requisition lines are filtered based on the items with lead time.
- Overdue Items: Displays the number of requisition lines with overdue items. When you click this button, the requisition lines are filtered based on the overdue items.
- The Grid based and Card based icon: This icon is used to change the view from the default grid view to the card view.
- Settings and Help: The settings menu includes options such as default/layout persistence. The help opens the online help. For more information refer to Search path for service contracts.

Note

The requisitions are displayed based on the Purchase Office and Buyer. The possible scenarios are:

Purchase Office	Buyer	Displayed requisitions
Yes	No	Infor LN displays all approved requisitions for all Buyers linked to the specified Purchase Office. Infor LN also considers the requisitions for which a buyer is not specified.
Yes	Yes	Infor LN displays all approved requisitions linked to the specified Buyer and Purchase Office.
No	No	Infor LN displays all approved requisitions.

Icons

- The ✎ detail icon allows the user to modify the REQ line data from the Grid/List view.
- The ➕ icon indicates, for an item/supplier combination, that there are approved suppliers and/or supplier(s) from whom the item is bought. If the icon is not enabled, the new item has no procurement history and no specific suppliers is available. This icon on the Card view is used to add groups in the Card grouping section.

- The ✅ icon allows the user to access the supplier related information. Click the icon to access the Supplier Selection window that displays list of approved and available suppliers along with the pricing information.

Chapter 3
Personalization

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User Setting

This section provide details about the various available user settings which can be used to personalize the Workbench view.
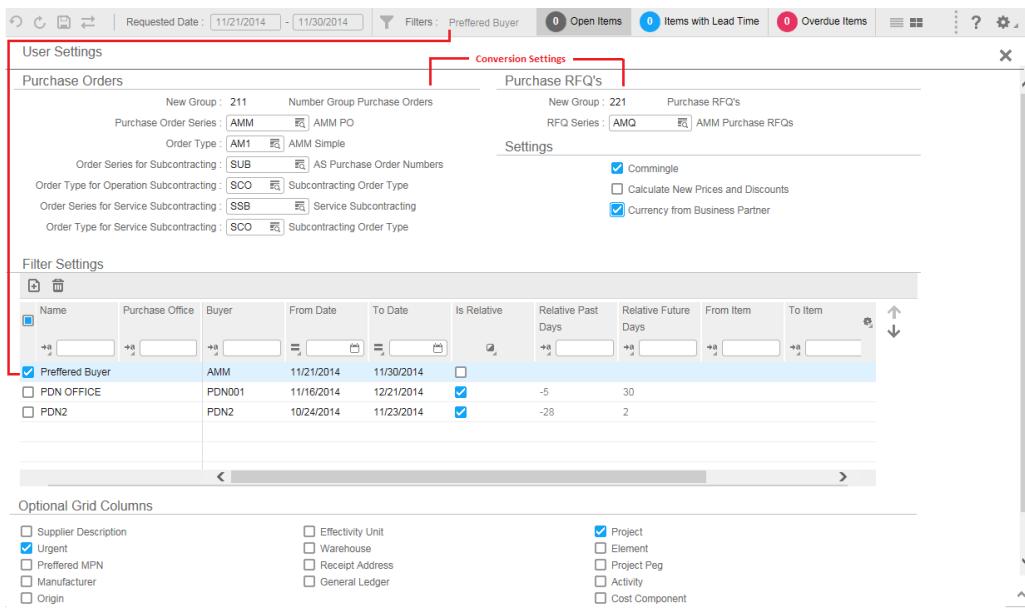
- The Conversion Setting section (refer to the image) allows you to modify the data for the purchase requisition conversion purpose. The modified data is not saved in Infor LN. The data in these sections is defaulted from the Convert Purchase Requisitions (tdpur2201m000) session, based on the purchase user profile of the specific user. However, you can modify the data in the workbench. The check boxes in the Settings section allows you to calculate new prices and discounts and default the currency of the business partner.

- The Filter settings section allows you to create, modify and delete the filters used as Workbench Quick Filters. The filter set at the top is the default setting for the workbench. You can also sort the default setting, using the Arrow Icons, located on the right side of the section.

- The Optional Grid Column section allows you to select the columns to be displayed in the default view.
- Get Defaults : Use this option to view the default setting.
- Save Default : Use this option to save your default setting. The same view is available every time you access the workbench.
- Clear Default : You can use this option to clear the default setting. After you clear the setting, the Infor LN, default view is displayed when you access the workbench.
- Get Layout Personalisation: You can use this section to retrieve the personalized view saved previously.
- Save Layout Personalisation: You can use this section to save your own personalized view.
- Clear Layout Personalisation: You can use this section to clear your personalized view.

Chapter 4
Using the Workbench

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Workbench Features

The workbench allows you to:

- Identify when a REQ with a requested date is due. Infor LN compares the due date with the current date and displays the number of days by which the REQ is due in the Due Days column. If the current date exceeds the due date, the number of days (negative) exceeded is displayed in red colour in the Due Days column and a red square box is displayed next to the Due Days column. If the due date has not exceeded the current date, the number of days due is displayed in blue colour in the Due Days column and a blue square box is displayed next to the Due Days column. You can click the flag in the Due Day column to update the follow up date for the REQ, if the current date does not exceed the due date. When you access the workbench, the requisition lines which are due on the current date are always populated first.

- Add or modify an item specified in the Items - Purchase (tdipu0101m000) session.

- Add or modify the order quantity.

- Add or modify the price specified in the Prepare Conversion Purchase Requisition Lines (tdpur2502m100) session, linked to the REQ line .

- Add or modify the Buy-from business partner specified in the Buy-from Business Partner (tccom4120s000) session, linked to the REQ line.

- Change the Conversion Type from Purchase Order to RFQ. By default, the Conversion Type is set to Purchase Order.

- Convert selected records to appropriate conversion type using the Convert Action button.

- View and edit the line text related to the REQ. To view the line text, click the line text icon in the Line Text column.

- Select the supplier from the Source/Supplier column, using the Buy-from Business Partners (tccom4520m000) session, if Approved or Available suppliers are not available, for the requisition line.

Card View

You can also view the requisition lines in the card view. The card view allows you to edit the Item, order quantity, price and supplier information. You can organize the requisition lines using the drag and drop

option. You can also copy suppliers from a requisition line to another, using the drag and drop option. The card view allows you to group the requisition related to same serialized item. After you select a requisition in the card view, and click ⊞ , you can view the requisition in the Card Grouping section available at the bottom of the screen. You can drag and drop the requisition related to the same serialized item to the requisition available in the Card Grouping view. You can select the 'Purchase Order' or ' Request for Quotation' check box to convert all the requisition to PO or RFQ. You can click the Source all button to link the suppliers to all the requisition lines of the group. When you click the Source all button, price breaks are displayed thereby allowing you to select the best possible price. To ungroup, you must select the group in the card view section and click the Ungroup icon.

Chapter 5
Graphical Interfaces

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Graphs

Graphs are used in the workbench to provide additional information to the user and facilitate decision making. When you select a REQ line in the list/grid view, you can click ✅ icon to view the graphical representation of the supply time, vendor rating and pricing information.

Supplier Selection section
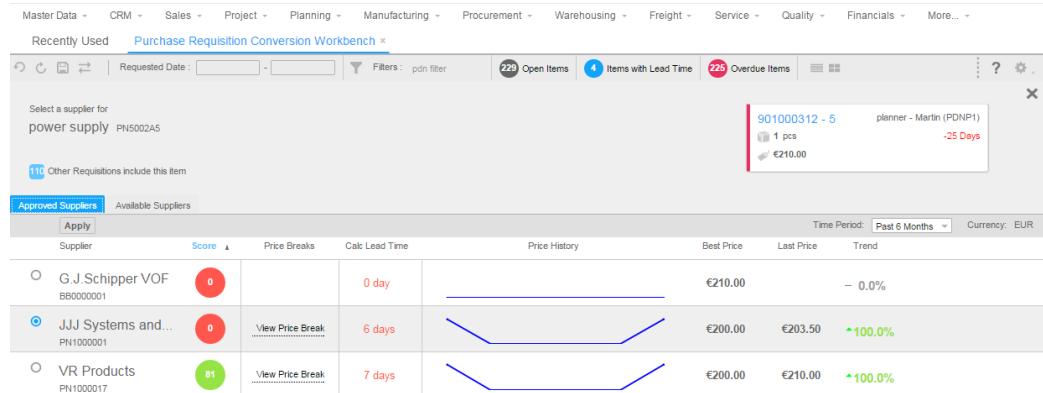
You can click ✅ to view the Supplier Selection section. This section displays the following information:

- The requisition line related information
- The Approved Supplier tab: Displays the list of approved suppliers. This section also provide information such as price break, calculated lead time, price history, supplier score and trend.
- The Available Supplier tab: Displays the list of suppliers that are not approved but are available for selection. The list also includes the Blocked suppliers in the Item Purchase Business Partners session. If for a supplier and an item combination a PO exists in the Purchase Order Line History session, the supplier is also listed here. This section also provide information such as price break, calculated lead time, price history, supplier score and trend.

Note

- The trend percentage is calculated based on the current period price and the previous period price. Following colours are used to indicate the trend:
    - Green arrow indicates an upward trend
    - Red arrow indicates a downward trend
    - The "-" symbol in Black indicates no change in the trend.
- Following colours are used to indicate the vendor rating scores:
    - Green: If vendor rating > 80.
    - Yellow: If vendor rating >=70 but <= 80
    - Ruby: If vendor raring < 70
- You can view the price history for a period of six months and twelve months.

Vendor Rating Scorecard
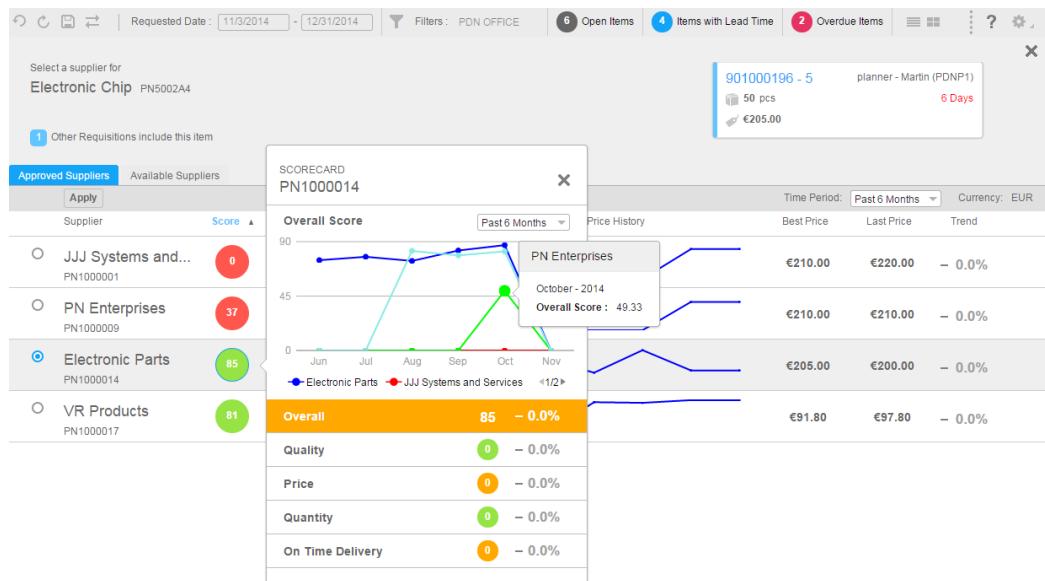
To access this scorecard, click the Supplier Score. In the Scorecard:

- The Blue line in the graph indicates the pattern for the selected supplier. The other suppliers are also displayed in the graph.
- You can view the graph based on the three, six, nine and twelve months' period. The default view is for the period of six months.
- You can view the vendor rating based on the specified criteria. You can also view the trend percentage which is calculated based on the current period rating and the previous period rating.

Price break section

To access this section, click the View Price Break option in the Supplier Selection section. This view displays the price break-up data for the selected supplier. By default, the price break closest to the quantity specified in the requisition line is displayed. However, you can click the View More option to display additional price breaks. When you click Apply, the selected price and quantity is updated for the particular requisition line.

The price break-up information is available based on the number of units. Example: 10 units are available for 100$, 15 units are available for 150$ and 20 units are available for 200$. If you order for units less than the price for the minimum units available in the price break section, and your order is short by a margin of 10 percent of the price break of the minimum unit, Infor LN displays the price for the minimum units.

Supply time based on period

You can view the supplier calculated lead time based on the period. Infor LN calculates the lead time in the Items - Purchase Business Partner (tdipu0110m000) session. The lead time is the difference between the Created date (REQ header) and the Requested date (REQ line).

Example

Created date = 17/01/2013, Requested date = 31//01/2013

Lead time from REQ is 14 days (Created date - Requested Date)

The dates are based on the value specified for the **Default Availability Type** field in the Procurement Parameters (tdpur0100m000) session.

The REQ Lead Time is compared with the Calculated Lead Time in the Items - Purchase Business Partner (tdipu0110m000) session. If the REQ lead time is less than the Calculated Lead Time, Red flag is displayed.

The colors indicate:

- Red color = below lead time
- Green = within lead time
- Yellow = equal to the lead time