



Memorandum

To: File

From: John Effland

Date: 2006-05-18

Revisions: 2006-05-18 jee Initial

Subject: Recommended Changes to P2P Forms and Field Names

1. Summary

In response to WBBS Helpdesk Ticket 1352 (b), this memo provides recommendations for field name changes that should improve the intuitiveness of the P2P forms. To further simplify the forms, also included are recommendations for deletion of seldom-used fields in both header and detail sections of the forms.

Purchasing and perhaps some managers need more fields than are recommended here, but requisitioners have demanded a simple user interface and consequently this memo shows just those fields that are deemed essential for the ordering process.

2. Changes to Header Fields

The term “Order Number” can be confusing, since there are Purchase Orders (PO’s) and Purchase Requisition (PR) numbers. Consequently, “Order Number” should be changed in all forms to the relevant “PR Number” or “PO Number”.

Figure 1 shows the Purchase Requisition Inquiry header along with recommendations for deleting certain text boxes to simplify the form for most users. Based on a recent teleconference with Partners¹, it is assumed that the “Supplier/Emp” field will soon change into two single-use fields.

Figure 2 shows similar changes recommended for the Purchase Order Inquiry header form. In that form, it is recommended that “Original Order” change to simply “PR”.

Recommended text box deletions to the PR entry header are shown in Figure 3.

3. Changes to Detail Fields

Table 1 shows just those fields in the detail section that are deemed essential for ordering.

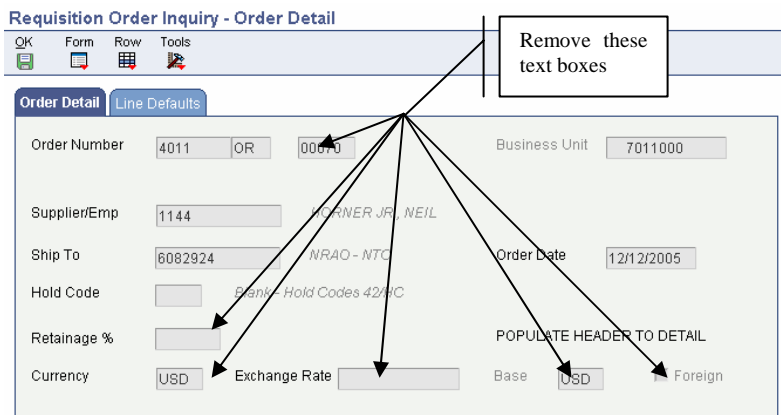


Figure 1: Recommended Changes to PR Order Inquiry Header

¹ Teleconference with Chuck Haggis, Chuck Beverage, Sheila Reasner, Carol Ziegler, and Dennis Walsh, 16 May 2006 @10:00.

Table 2 shows all the fields that are currently shown in the forms listed at the top of the table.

Purchase Order Inquiry - Work With Order Details

Select Find Add Copy Close Form Row Tools

Order Number * [] OP * [] Business/Unit * []

Related Order * [] * [] * [] * [] * []

Original Order 00004011 * [] * [] * [] * [] * [] As If Currency []

Commodity Code * []

Account Number * []

Type/Subledger * [] * [] Display Supplier Item

Remove these text boxes

Figure 2: Recommended Changes to PO Inquiry Header

Pur Req Entry - Pur to Account - Order Header

OK Cancel Form Tools

Order Number [] OR [] Business/Unit []

Currency [] Exchange Rate [] Base [] Foreign []

Address Numbers

Supplier/Emp * []

Ship To * []

Buyer/Empl * []

Carrier []

Pmt. Remark []

Description []

Print Message []

Dates

Order Date []

Date Needed * []

Promised Delivery []

Cancel Date []

Tax Expl Code [] Hold Code [] Blank - Hold Codes 42/HC

Tax Rate/Area [] Approval Code []

Certificate [] Retainage % []

Person/Corp. ID [] Ordered By JEFFLAND

Payment Terms [] Order Taken By []

AIA Document []

Remove these text boxes

Figure 3: Recommended Changes to PR Entry Form

**Table 1: Recommended Field Name Changes to Detail Sections:
Purchase Order Inquiry, and
Requisition Order Inquiry**

Existing Field Name	New Field Name	Notes
Line Number	Line	
Quantity Ordered	Qty	
TR. UOM	UofM	
Description 1 (ALL CAPS)	Desc 1	
Description 2 (ALL CAPS)	Desc 2	
Supplier SO (VR01)	Manuf.	New fields suggested by Chuck Haggis on 9 May 2006
Reference (VR02)	Man Prt Num <i>or better</i> Man Prt #	---“---
Lot/Serial (LOTN)	Vendor	---“---
Item Number (AITM)	Ven Prt Num <i>or better</i> Ven Prt #	---“---
Request Date	Date Entered	
Promised Date	Date Prom	
Unit Cost	Unit Cost	
Extended Cost	Ext. Cost	
Cost Center	Cost Cntr	
Obj Acct	Obj Code	
Sub	Sub	
LN Ty	Line Type	
Next Status	Next Stat	Do users really need to see last status?

Table 2: Fields shown in Existing Purchase Req and Order Inquiry Detail Sections

Purchase Order Inquiry	Requisition Order Inquiry
Change Order	Order Number
Commodity Code	Quantity to Receive
Quantity Ordered	UM
TR. UOM	Amount To Receive
Sec Quantity Ordered	Ship to
Sec UOM	Or Ty
Unit Cost	Order Co
Extended Cost	Change Order
Pu. UOM	Supplier Number
LN Ty	Supplier/Empl Name
Description 1 (ALL CAPS)	Line Description
Description 2 (ALL CAPS)	Ln Ty
Account Number	2nd Item Number
Cost Center	Account Number
Obj Acct	Sub Type
Sub	Subledger
Sub Type	Cost Center
Subledger	Obj Acct
Line Number	Sub
Matrix Line Number	Base Curr

Table 2: Fields shown in Existing Purchase Req and Order Inquiry Detail Sections

Purchase Order Inquiry	Requisition Order Inquiry
Business Unit Ship To Number Buyer/Empl Number Mod Trn Carrier Number Last Status Next Status Planned Effective Request Date G/L Date Promised Delivery Cancel Date Tax Y/N Expl Code Tax Rate/Area Discount Factor Item Price Group Price Cat Level Print Message Lot/Serial - has requisitioner's name in it Location Asset ID Report Code 1 Report Code 2 Report Code 3 Report Code 4 Cost Rule Extended Weight Wt UoM Extended Volume Vol UoM Supplier SO Reference G/L Offset ER FC SM Project Number Original Order No Orig Type Orig Co Original Line No Orig Sfx Agreement Number Agreement Supplement Substitution Exists Blankets Exist Agreement Exists	Foreign Amount to Receive Buyer/E... Number Transaction Originator Curr Unit Cost Foreign Unit Cost Order Date Request Date Orginal Promise Promised Delievery Date G/L Date Last Status Next Status Cancel Date Original Ordered Amount Report Code 1 Report Code 2 Report Code 3 Report Code 4 Orginal Ordered Foreign Amount Commodity Code Short Item No Asset ID Cost Rule Original Number Original Type Original Co Original Line Orig Sfx Related Number Related Type Related Co Related Line Line Number Tax y/n Tax Expl Tax Reat/Area Receipt Date Plan Elevation

Table 2: Fields shown in Existing Purchase Req and Order Inquiry Detail Sections	
Purchase Order Inquiry	Requisition Order Inquiry
Item Flash Message Plan Elevation	