



COLLABORATE 18

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

What Is New for Procurement Applications From 12.1.3 - 12.2.7?

Session ID:

10421

Prepared by:

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@O2Works_Gary

April 24, 2018 11-12PM

Remember to complete your evaluation for this session within the app!

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About The Presenter

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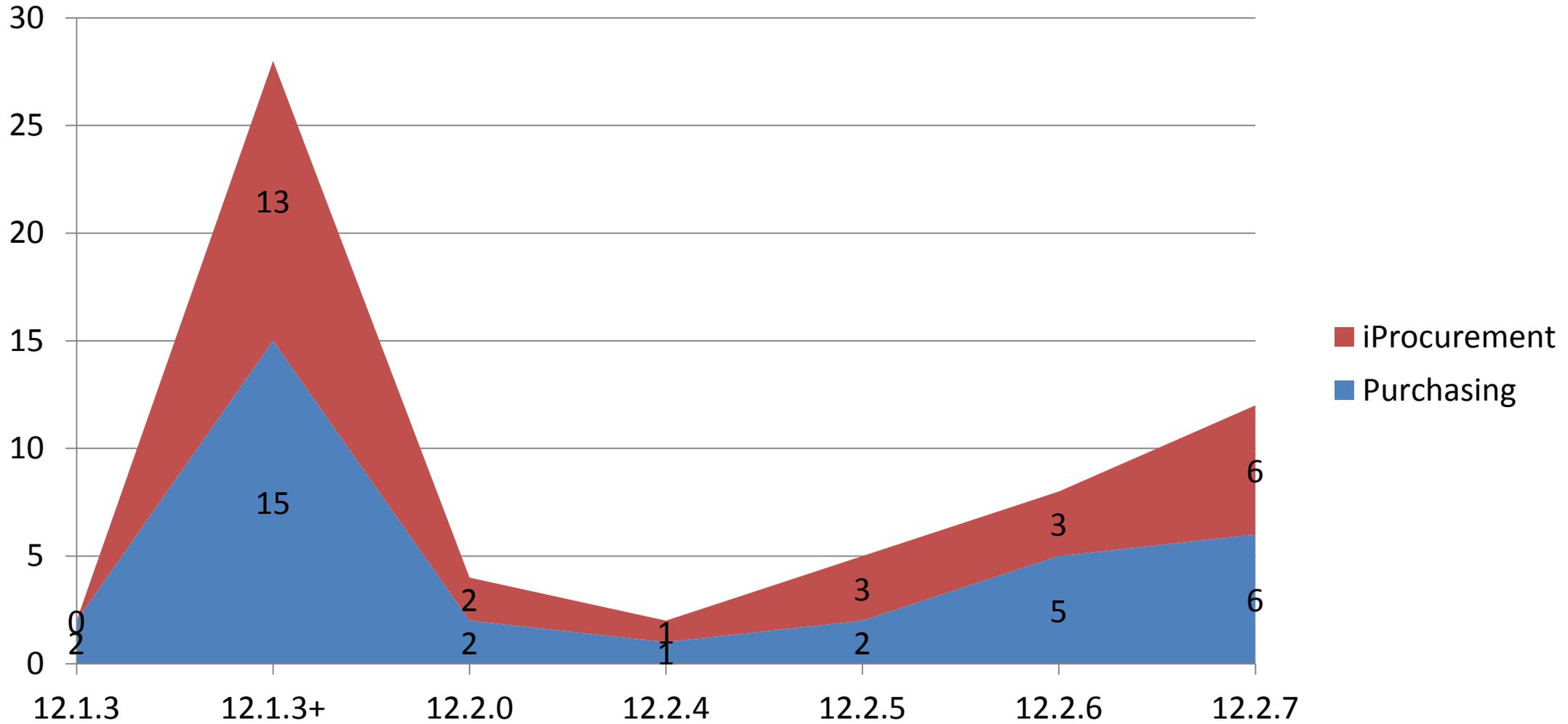
Overview

- Starting with release 12.1.3 there have been 6 or more functionality releases to Purchasing and iProcurement.
- This session will focus on providing information on those new features and functionality.
- From release 12.1.3 through 12.2.7 we will provide highlights of some of the latest and greatest features that your purchasing applications have to offer!

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Purchasing and iProcurement 12.1.3 – 12.2.7

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Purchasing and iProcurement 12.1.3 – 12.2.7

- Total 33 Purchasing updates
- Total 28 iProcurement updates

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Purchasing Highlights 12.1.3 and 12.1.3+

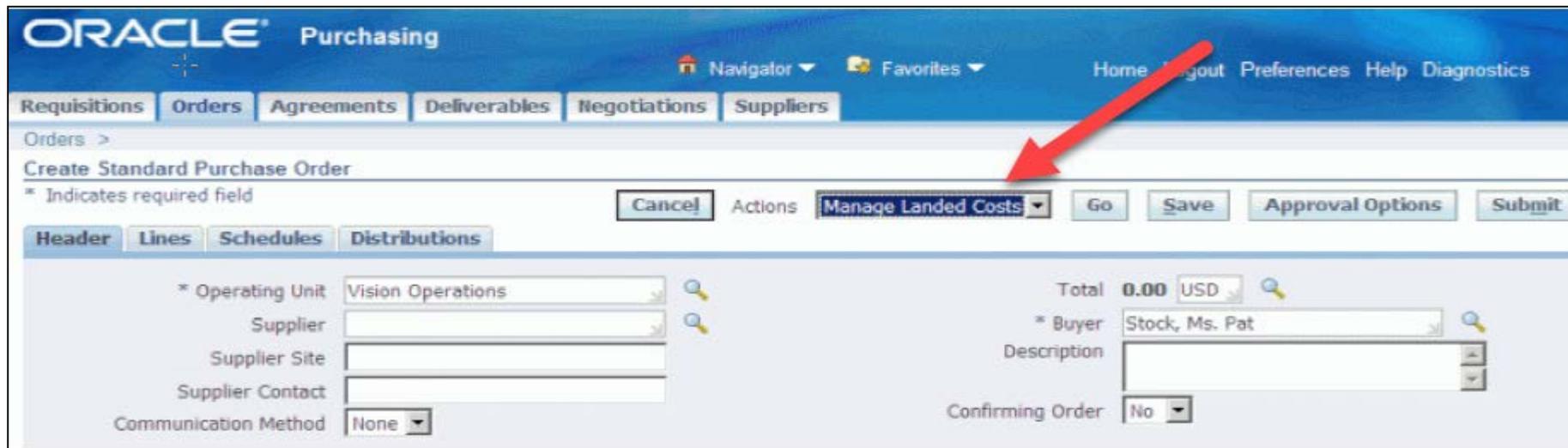


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Purchasing 12.1.3 – Landed Cost Management

- Oracle Landed Cost Management Integration
 - Valuate goods at their actual cost
 - Take freight, taxes, and insurance into consideration

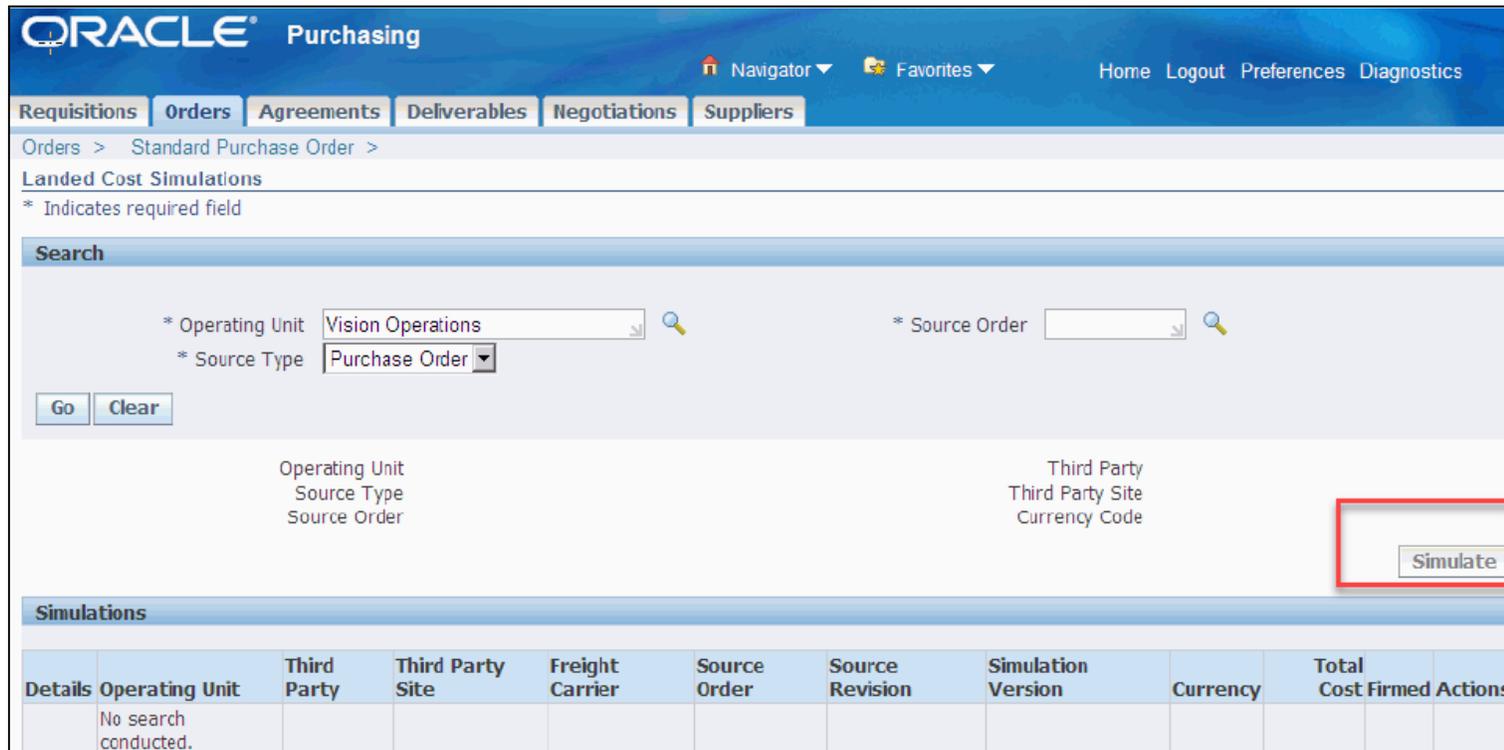


The screenshot displays the Oracle Purchasing web interface. At the top, the Oracle logo and 'Purchasing' title are visible. Below the title bar, there are navigation tabs for 'Requisitions', 'Orders', 'Agreements', 'Deliverables', 'Negotiations', and 'Suppliers'. The 'Orders' tab is selected. The main heading is 'Create Standard Purchase Order'. Below this, there is a row of buttons: 'Cancel', 'Actions', 'Manage Landed Costs' (highlighted with a red arrow), 'Go', 'Save', 'Approval Options', and 'Submit'. The 'Manage Landed Costs' dropdown menu is open, showing a list of options. Below the buttons, there are several input fields for order details, including 'Operating Unit' (Vision Operations), 'Supplier', 'Supplier Site', 'Supplier Contact', 'Communication Method' (None), 'Total' (0.00 USD), 'Buyer' (Stock, Ms. Pat), 'Description', and 'Confirming Order' (No).

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Purchasing 12.1.3 – Landed Cost Management

- Perform Simulations



ORACLE Purchasing

Navigator Favorites Home Logout Preferences Diagnostics

Requisitions Orders Agreements Deliverables Negotiations Suppliers

Orders > Standard Purchase Order >

Landed Cost Simulations

* Indicates required field

Search

* Operating Unit * Source Order

* Source Type

Go Clear

Operating Unit
Source Type
Source Order

Third Party
Third Party Site
Currency Code

Simulate

Simulations

| Details | Operating Unit | Third Party | Third Party Site | Freight Carrier | Source Order | Source Revision | Simulation Version | Currency | Total Cost | Firmed | Actions |
|----------------------|----------------|-------------|------------------|-----------------|--------------|-----------------|--------------------|----------|------------|--------|---------|
| No search conducted. | | | | | | | | | | | |

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Purchasing 12.1.3 + Approvals Management Engine

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- AME integration with Purchasing Documents

Document Types

| Enable | Type | Display Name |
|-------------------------------------|-----------------------------|-----------------------------|
| <input checked="" type="checkbox"/> | Standard Purchase Order | Standard Purchase Order |
| <input checked="" type="checkbox"/> | Contract Purchase Agreement | Contract Purchase Agreement |
| <input checked="" type="checkbox"/> | Blanket Purchase Agreement | Blanket Purchase Agreement |

Document Controls

Approval Workflow

Workflow Startup Process

AME Transaction Type

Withdrawal Options

Allow Document Withdrawal

Send Withdrawal Notifications to all Approvers

Commodities

Purchase Bases

Goods

Services

Temp Labor

Purchasing 12.1.3 + Withdraw

- Withdraw purchase orders that are in-process or pre-approved

Document Types

| Enable | Type | Display Name |
|-------------------------------------|-----------------------------|--|
| <input checked="" type="checkbox"/> | Standard Purchase Order | <input type="text" value="Standard Purchase Order"/> |
| <input checked="" type="checkbox"/> | Contract Purchase Agreement | <input type="text" value="Contract Purchase Agreement"/> |
| <input checked="" type="checkbox"/> | Blanket Purchase Agreement | <input type="text" value="Blanket Purchase Agreement"/> |

Document Controls

Approval Workflow
Workflow Startup Process
AME Transaction Type

Withdrawal Options

- Allow Document Withdrawal
- Send Withdrawal Notifications to all Approvers

Commodities

Purchase Bases

- Goods
- Services
- Temp Labor

Orders

Indicates a pending change request

Headers | Lines | Schedules | Pay Items | Distributions

Views

View

Select Order: | |

| Select | OU | Order | Rev | Description | Supplier | Site | Creation Date |
|----------------------------------|----|--------|-----|-------------|-------------|--------|---------------|
| <input checked="" type="radio"/> | CS | 678619 | 0 | | O2WORKS LLC | DALLAS | 27-Feb-2018 |

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Purchasing 12.1.3 + Withdraw

- Enter a reason for the withdrawal and if configured to do so the pending approver will be notified.

Withdraw: Standard Purchase Order 678619

* Indicates required field

This action will withdraw the document. The withdrawal reason you enter will be included in the withdrawal email notification.

* Withdrawal Reason

Purchasing 12.1.3 + Outside Processing Items

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- Outside Processing Items (OSP) can now be included on global blanket agreements.

The screenshot displays the Oracle Purchasing interface for a Blanket Purchase Agreement. The breadcrumb path is 'Agreements > Blanket Purchase Agreement 678612'. The 'Lines' tab is active, showing a table with one line item. A red arrow points to the 'Line Type' field, which is 'Outside Processing - CS'. The table columns include Line, Type, Item/Job, Description, Category, Unit, Price, Expiration Date, and Details.

| Line | Type | Item/Job | Description | Category | Unit | Price | Expiration Date | Details |
|------|-------------------------|--------------------|--------------------|------------------------|------|-------|-----------------|---------|
| 1 | Outside Processing - CS | OSP - Test Item GM | OSP - Test Item GM | OSP.BAR.FINISHED GOODS | EA | | | |

Purchasing 12.1.3 + Buyer Work Center Defaults

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- Set Buyer Work Center preferences to aid in document creation.

Purchasing Preferences [Cancel] [Apply]

Document Defaults

Line Type Transaction Reason
Price Type Category

Schedule Defaults **Delivery Defaults**

Organization Destination Subinventory
Location Requester
Need-By Date Deliver-To
Promised Date Requisition
Requisition Line

Receiving Defaults **Billing Defaults**

Receipt Days Early Match Approval Level
Receipt Days Late Invoice Match Option
Receipt Close Tolerance (%) Invoice Close Tolerance (%)
Over Receipt Tolerance (%) PO Charge Account
Receipt Routing Encumbered Date

Project and Expenditure Defaults

Project Task
Expenditure Org Expenditure Type
Expenditure Item Date

Purchasing 12.1.3 + Other Enhancements

- Importing Complex Purchase Orders
- Configurable Notifications in Purchase Order
- Current and Pending Approvers in the action history
- New Approved Supplier List API's
- Purchasing Document Open Interface Enhancements
- Promise Date defaulting as a calculation of the order approval date + Lead time on GBPA.

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Purchasing Highlights 12.2, 12.2.4 and 12.2.5



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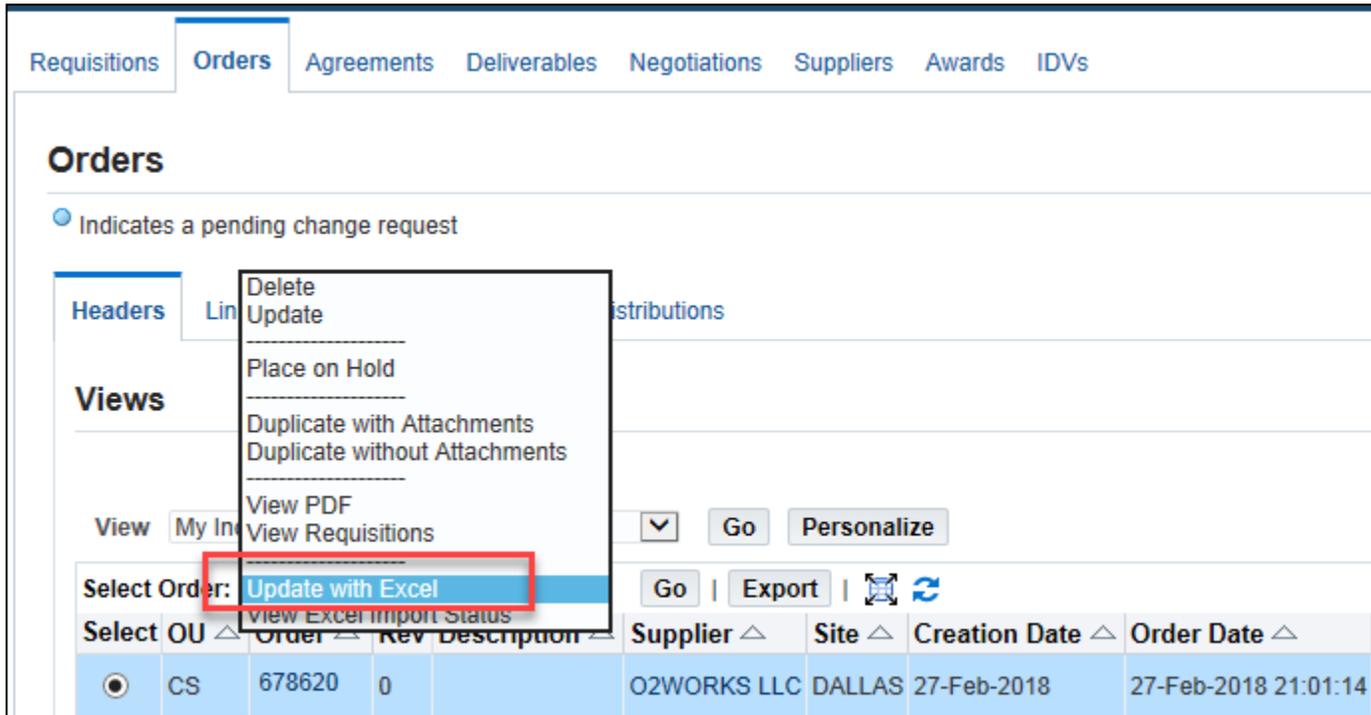
Purchasing 12.2

- Support for Additional Extension Hooks during the AutoCreate process.
- Encumbrance GL update – based on profile

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Purchasing 12.2.4 – Update with Excel

- Spreadsheet-Based Authoring of Purchase Order Lines

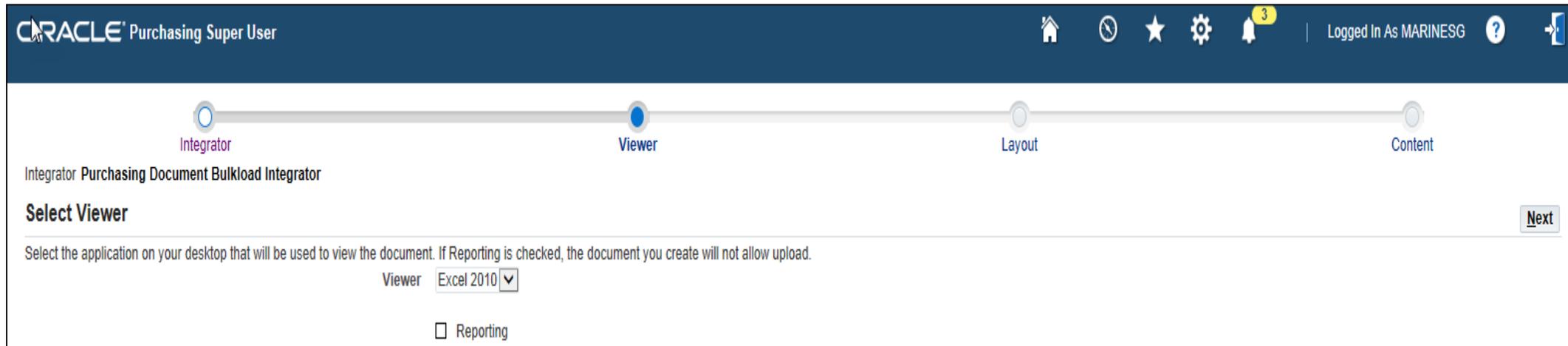


The screenshot displays the Oracle Purchasing interface. At the top, there are navigation tabs: Requisitions, Orders (selected), Agreements, Deliverables, Negotiations, Suppliers, Awards, and IDVs. Below the tabs, the 'Orders' section is active, with a note: 'Indicates a pending change request'. On the left, there are sections for 'Headers' and 'Views'. A dropdown menu is open over the 'Update with Excel' option, which is highlighted with a red box. The menu items include: Delete, Update, Place on Hold, Duplicate with Attachments, Duplicate without Attachments, View PDF, and View Requisitions. Below the menu, there are buttons for 'Go', 'Personalize', 'Go', 'Export', and a refresh icon. A table of order lines is visible at the bottom, with columns: Select, OU, Order, Rev, Description, Supplier, Site, Creation Date, and Order Date. The first row is selected and highlighted in blue.

| Select | OU | Order | Rev | Description | Supplier | Site | Creation Date | Order Date |
|----------------------------------|----|--------|-----|-------------|-------------|--------|---------------|----------------------|
| <input checked="" type="radio"/> | CS | 678620 | 0 | | O2WORKS LLC | DALLAS | 27-Feb-2018 | 27-Feb-2018 21:01:14 |

Purchasing 12.2.4 – Update with Excel

- Pick which version of Excel



The screenshot shows the Oracle Purchasing Super User interface. At the top, the breadcrumb trail reads "Integrator Purchasing Document Bulkload Integrator". A progress bar below the breadcrumb has four steps: "Integrator", "Viewer", "Layout", and "Content". The "Viewer" step is currently active, indicated by a blue dot. Below the progress bar, the text "Select Viewer" is displayed. Underneath, there is a dropdown menu labeled "Viewer" with "Excel 2010" selected. A checkbox labeled "Reporting" is also present and is currently unchecked. In the top right corner of the interface, there are navigation icons (home, clock, star, gear, bell with a '3' notification), the text "Logged In As MARINESG", and a help icon.

Purchasing 12.2.4 – Update with Excel

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- Download the order

The screenshot displays the Oracle Purchasing interface. A 'Download' dialog box is open, showing a 'Confirmation' message: 'The download process has completed successfully. Press Close to return to the document.' The dialog box has a 'Close' button. In the background, the Oracle interface shows a form with the following fields:

| | | |
|-----------------|------|-------------------------|
| Operating Unit | Text | CS |
| Status | Text | Incomplete |
| Total | Text | USD 210 |
| Document Name | Text | Standard Purchase Order |
| Document Number | Text | 678620 |
| Buyer Name | Text | Marines, Gary |
| Supplier | Text | O2WORKS LLC |
| Supplier Site | Text | DALLAS |
| Approved Date | Date | |

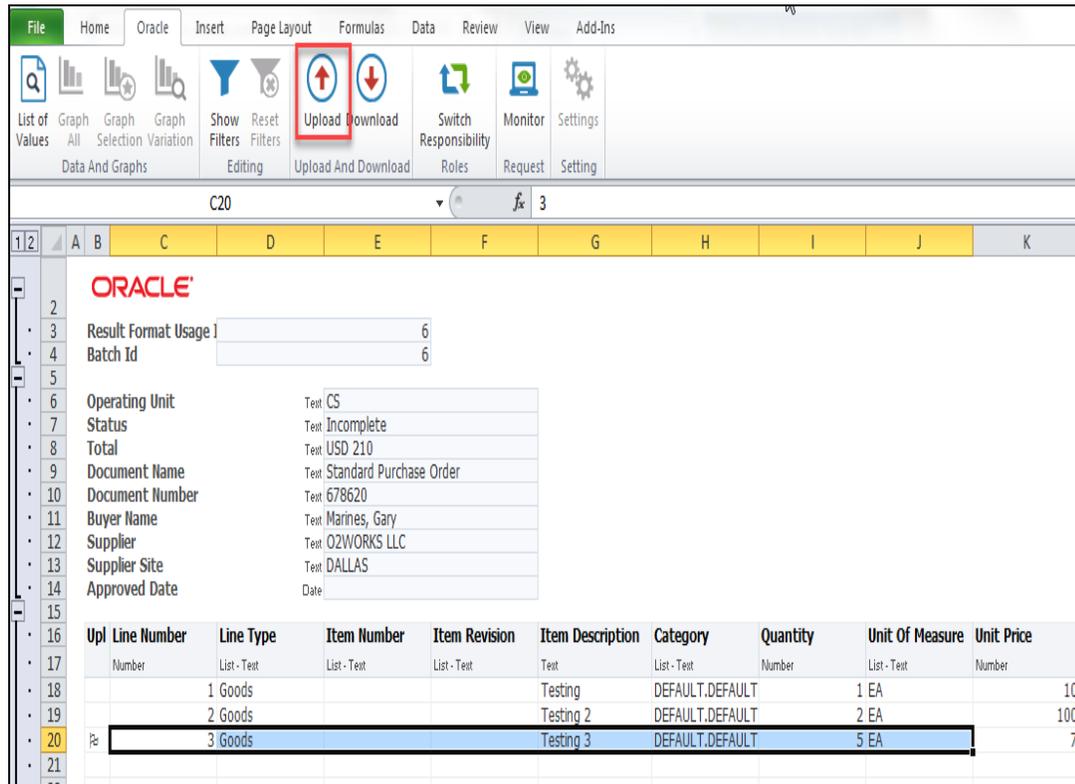
Below the form, a table is visible with the following columns: 'Upl Line Number', 'Line Type', 'Item Number', 'Item', 'Need-by Date', and 'Promise'. The table contains two rows of data:

| Upl Line Number | Line Type | Item Number | Item | Need-by Date | Promise |
|-----------------|-----------|-------------|------|--------------|---------|
| 1 | Goods | | | 2/28/2018 | |
| 2 | Goods | | | 2/28/2018 | |

Purchasing 12.2.4 – Update with Excel

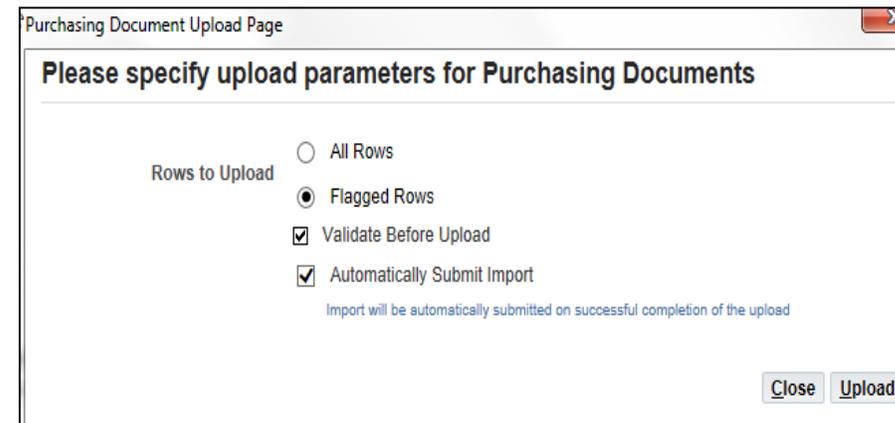
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- Upload some or all lines based on flag



The screenshot shows the Oracle Purchasing interface with an Excel spreadsheet. The 'Upload' button in the 'Upload And Download' group of the ribbon is highlighted with a red box. The spreadsheet contains the following data:

| Upl Line Number | Line Type | Item Number | Item Revision | Item Description | Category | Quantity | Unit Of Measure | Unit Price |
|-----------------|-----------|-------------|---------------|------------------|-----------------|----------|-----------------|------------|
| 1 | Goods | | | Testing | DEFAULT.DEFAULT | 1 | EA | 10 |
| 2 | Goods | | | Testing 2 | DEFAULT.DEFAULT | 2 | EA | 100 |
| 3 | Goods | | | Testing 3 | DEFAULT.DEFAULT | 5 | EA | 7 |



The screenshot shows the 'Purchasing Document Upload Page' dialog box. The title is 'Please specify upload parameters for Purchasing Documents'. The options are:

- Rows to Upload:
 - All Rows
 - Flagged Rows
- Validate Before Upload
- Automatically Submit Import

Import will be automatically submitted on successful completion of the upload

Buttons: Close, Upload

Purchasing 12.2.4 – Update with Excel

- Validate new lines have uploaded

ORACLE Purchasing

Requisitions Orders Agreements Deliverables Negotiations Suppliers Awards IDVs

Orders >
Update Standard Purchase Order 678620

* Indicates required field

► Search

Header Lines Schedules Distributions

Operating Unit CS Status Incomplete

Add Lines: From Catalog Go Update with Excel

| *Line | *Type | Item/Job | *Description | *Category | Qty | Unit | Price | Amount | Need-By/Start Date | Actions |
|-------|-------|----------|--------------|-----------|-----|------|-------|--------|--------------------|---|
| 1 | Goods | | Testing | DEFAULT.C | 1 | EA | 10 | 10.00 | 28-Feb-2018 2 |    |
| 2 | Goods | | Testing 2 | DEFAULT.C | 2 | EA | 100 | 200.00 | 28-Feb-2018 0 |    |
| 3 | Goods | | Testing 3 | DEFAULT.C | 5 | EA | 7 | 35.00 | 28-Feb-2018 0 |    |

Purchasing 12.2.5 (12.2.4+) – OPM and OSP

- The Oracle Process Manufacturing Batch-Step Outside Processing enables process manufacturers to send **material** out of their plant for a batch step in the manufacturing process **to produce** their finished goods.
- Key Components
 - Automate requisition creation
 - Keep synchronization of Purchase Order and Batch
 - Partial or full receipt capability
 - Returns and adjustments
 - OPM Costing

Purchase Order Summary to Releases - 678610-4

Distributions - 678610-4, 1

Destination More Project

| Num | Source | Destination Type | Requester |
|---------------------------|--------|------------------|-----------|
| Outside Processing (2021) | | Distribution 1 | |

Batch: BATCH500000011

Product:

Operation:

| | |
|----------|------|
| Step | 10 |
| Code | ES-O |
| Activity | OSP |

Resource:

| | |
|--------------|---------------|
| Resource | ES-OSP-ESP-GF |
| UOM | HR |
| Resource Qty | 80.00080000 |

Unit Type: Assembly

Product Qty: 2000

Done Cancel

See batch and step information on PO

Purchasing Highlights 12.2.6 & 12.2.7



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Purchasing 12.2.6 – Defaulting Rule for Acknowledgment Date

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- Configure an offset rule for the Acknowledgement Due Date
 - Purchasing Options
 - Supplier Site Purchasing Settings

Purchasing Options Operating Unit: UL LLC [Go] [Cancel] [Save]

* Indicates required field

Document Control

Price Tolerance (%) []
Price Tolerance Amount (USD) []
Enforce Full Lot Quantity: Advisory [v]
Receipt Close Point: Received [v]
Cancel Requisitions: Optionally [v]
SBI Buying Company Identifier []
Output Format: PDF [v]
Maximum Attachment Size (in MB): 10
Email Attachment Filename: Attachments.zip

Enforce Price Tolerance (%)
 Enforce Price Tolerance Amount
 Display Disposition Messages
 Notify if Blanket PO exists
 Allow Item Description Update
 Enforce Buyer Name
 Enforce Supplier Hold
 Gapless Invoice Numbering
 RFQ Required
 Group Shipments

Document Defaults

Requisition Import Group-By: All [v]
Internal Requisition Order Type: UL LLC Stands [v]
Internal Requisition Order Source: Internal [v]
Receipt Close Tolerance (%): 2
Invoice Close Tolerance (%): 2
Quote Warning Delay
Acknowledgement Required: None [v]
Acknowledgment Lead Time (Days) []

Line Type: Goods [v]
Rate Type: Corporate [v]
Match Approval Level: 3 Way [v]
Price Break Type: Cumulative [v]
Price Type: [v]
Minimum Release Amount (USD) []
Buyer [v]

Receipt Accounting

Accrue Expense Items: Period End [v]
Accrue Inventory Items: At Receipt [v]

Automatic Offset Method: None [v]
* Expense AP Accrual Account: 720 20110.00000.00000.000.000.0 [v]

LEGAL COMPANY GLOBAL ACCOUNT LOCAL ACCOUNT COST CENTER LOCATION SERVICE LINE INDUSTRY AFFILIATE FUTURE

Purchasing 12.2.6 – PO Approval Attachments

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- Approvers of purchasing documents can view header level attachments and the line level charge account in the approval notification.

Home > **UL LLC** Standard Purchase Order 7202087189,0 for 100.00 USD requires your approval. Approve Approve And Forward Forward Reject Reassign Request Information

From Cady, Bob
To Lewis, Michael
Sent 03/20/2018 13:32:13
ID 62340694

Standard Purchase Order 7202087189

| | | | |
|---------------|-----------------|---------------|---------|
| Supplier | TRANSSMART INC. | Amount | 100.00 |
| Site | ROLLING MEADOWS | Tax | 0.00 |
| Freight Terms | | Currency | USD |
| Buyer | Cady, Robert | Payment Terms | 2%10N60 |
| Description | | | |

Line Details

| Line | Item Number | Rev. | Item Description | UOM | Quantity | Unit Price | Line Amount | Need By Date | Charge Account | Project | Task |
|------|-------------|------|-------------------------------|-----|----------|------------|-------------|--------------|---|---------|------|
| 1 | | | Test PO creation notification | CUR | 100 | 1 | 100.00 | 27-MAR-2018 | 720.64003.00000.51318.740.098.010.000.00000 | | |

Approval Sequence

| Sequence | Who | Date | Action | Note |
|----------|--------------------|------------|---------|--------------------------|
| 2 | Cady, Robert (Bob) | 03/20/2018 | Forward | Justification to approve |
| 1 | Cady, Robert (Bob) | 03/20/2018 | Submit | Justification to approve |

Related Applications

- PDF Document
- Edit Document
- View Document Details
- View Document Attachment**
- Open Document

Response

Forward To: All Employees and Users

Response Note:

Purchasing 12.2.6 – Requester PO Approval Notification

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- Requesters can get PO Creation and Approval notifications managed by new profile options

| Category | Profile Option Name | Feature Area | Description |
|--------------------|---|---------------|---|
| New Profile Option | PO: Notify Requester On Order Creation | Notifications | If set to Yes, sends a notification to requester when an order is created for the requisition. |
| New Profile Option | PO: Notify Requester On Order Approval | Notifications | If set to Yes, sends a notification to requester when an order created for the requisition is approved. |
| New Profile Option | PO: Notify Buyers When Purchase Requisition is Assigned | Notifications | If set to Yes, sends a notification to buyer when a requisition is assigned to the buyer. |

Purchasing 12.2.6 – Requester PO Approval Notification

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Home > Worklist >

Information

This notification does not require a response.

Standard Purchase Order has been created for Purchase Requisition 88720087704 and is awaiting approval [OK](#) [Reassign](#) [More Information Request](#)

From Cady, Bob
To Cady, Bob
Sent 20-Mar-2018 10:43:54
ID 62340663

Purchase Requisition 88720087704
Description Test PO creation notification
Requisition Total 100.00 USD
Non-Recoverable Tax 0.00 USD
Attachments

Requisition Lines

| Line | Item Number | Description | Supplier | Cost Center | Unit | Quantity | Price | Price (USD) | Amount (USD) | Order | Promised Date | Project | Task | Order Status |
|------|-------------|-------------------------------|------------------|-------------|------|----------|-------|-------------|--------------|---------|---------------|---------|------|--------------|
| 1 | | Test PO creation notification | TRAINS... INC | 51318 | | | | | 100 | 7202... | | | | IN PROCESS |

[Return to Worklist](#)

Display next notification after my response

Purchasing 12.2.7 – Purchase Order Approval Notification

- A purchasing administrator can hide or show 'Forward' and 'Approve and Forward' options in the Purchase Order Approval notification through a profile option.

| Category | Profile Option Name | Feature Area | Description |
|--------------------|-------------------------------------|--------------|--|
| New Profile Option | PO:Allow PO Approval Forward Action | Notification | <p>The profile option enables users to display or hide the "Forward" and "Approve and Forward" buttons in the approval notification. When the value of the profile option is Yes, these two buttons are displayed. The default value of the profile option is Yes. When the value of the profile option is No, these two buttons are not visible in the notification. This profile option is available at the site level only.</p> <p>Thus you see the following buttons: Approve, Reject, Reassign, and Request Information, in the notification.</p> |

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Purchasing 12.2.7 – Automate Grouping of Multiple Requisitions for PO Creation

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- Create Standard Purchase Orders Concurrent Program.
 - Use this program to group multiple requisition lines into a single order.
 - Program uses existing create document workflow and purchasing document open interface.

The screenshot displays two overlapping windows from a purchasing system. The background window is titled 'Submit Request' and contains the following fields and options:

- Run this Request:** A 'Copy' button is located in the top right.
- Name:** 'Create Standard Purchase Orders' (highlighted in yellow)
- Operating Unit:** 'Vision Operations' (highlighted in yellow)
- Parameters:** (empty field)
- Language:** 'American English'
- Language Settings** and **Debug Options** buttons are at the bottom.
- At these Times:** 'Run the Job' is set to 'As Soon as Possible'.
- Upon Completion:** 'Save all Output Files' is checked.
- Layout:** (empty field)
- Notify:** (empty field)
- Print to:** 'noprint'
- Buttons:** 'Help (C)', 'Submit', and 'Cancel' are at the bottom.

The foreground window is titled 'Parameters' and contains the following fields and options:

- Group Header:** 'VENDOR' (highlighted in yellow) with a dropdown arrow and 'Vendor' text to the right.
- Group Order Lines:** 'Yes' (highlighted in yellow)
- Approval Status:** 'INCOMPLETE' (highlighted in yellow) with 'Incomplete' text to the right.
- Buttons:** 'OK', 'Cancel', 'Clear', and 'Help' are at the bottom.

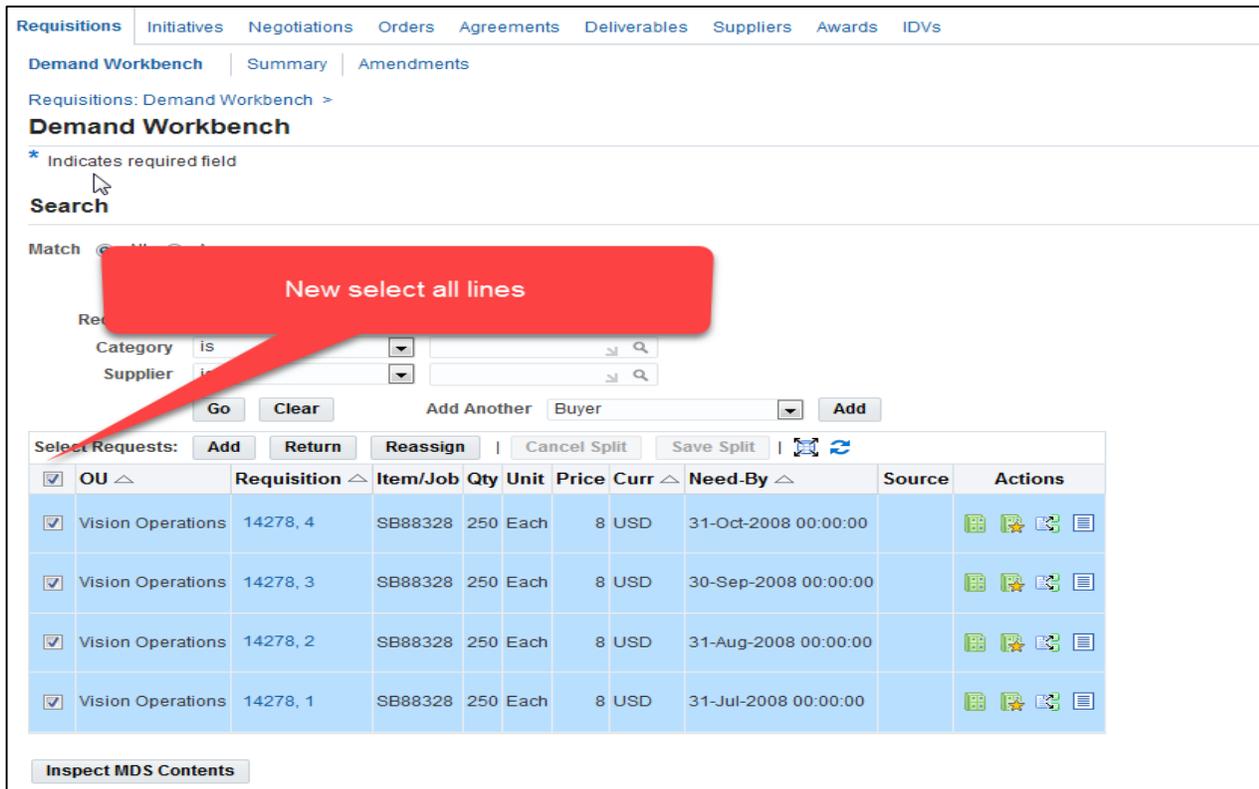
Purchasing 12.2.7 – Other Features

- Validate BPA Line Amount Agreed During Order/Release Submission
- Using Non-Case Sensitive Searches in Requisition and Purchasing Forms

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Purchasing 12.2.7 – Other Features

- Add all lines of a requisition to a document at once in the buyer work center



The screenshot displays the Oracle Purchasing Demand Workbench interface. At the top, there are navigation tabs: Requisitions, Initiatives, Negotiations, Orders, Agreements, Deliverables, Suppliers, Awards, and IDVs. Below these, there are sub-tabs: Demand Workbench, Summary, and Amendments. The main heading is "Demand Workbench". A note indicates that an asterisk (*) denotes a required field. A search section is visible with fields for Category and Supplier, and buttons for Go, Clear, Add Another, Buyer, and Add. Below the search section is a table titled "Select Requests:" with columns for OU, Requisition, Item/Job, Qty, Unit, Price, Curr, Need-By, Source, and Actions. The table contains four rows of requisition lines, all of which are selected with checkmarks. A red callout box with the text "New select all lines" points to the "Add" button in the "Select Requests:" section.

| OU | Requisition | Item/Job | Qty | Unit | Price | Curr | Need-By | Source | Actions |
|-------------------|-------------|----------|-----|------|-------|------|----------------------|--------|---------|
| Vision Operations | 14278, 4 | SB88328 | 250 | Each | 8 | USD | 31-Oct-2008 00:00:00 | | [Icons] |
| Vision Operations | 14278, 3 | SB88328 | 250 | Each | 8 | USD | 30-Sep-2008 00:00:00 | | [Icons] |
| Vision Operations | 14278, 2 | SB88328 | 250 | Each | 8 | USD | 31-Aug-2008 00:00:00 | | [Icons] |
| Vision Operations | 14278, 1 | SB88328 | 250 | Each | 8 | USD | 31-Jul-2008 00:00:00 | | [Icons] |

iProcurement Highlights 12.1.3+



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iProcurement 12.1.3+ – Charge Account

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- Under certain circumstances, iProcurement gets the charge account from your Employee record in HR. If you select this checkbox and specify a primary favorite charge account, iProcurement will use your Primary Favorite Charge Account instead of the Employee Charge Account.

ORACLE iProcurement

Shop Requisitions Receiving

General

Display Preferences

Application

iProcurement Preferences

Requisitions CLM Defaults

iProcurement Preferences

* Indicates required field

Cancel Apply

Shopping

* My Favorite Store No Preference

* Search Results Per Page 10 For best performance, enter a number between 1 and 100.

* Shopping Search Results Per Page 20 For best performance, enter a number between 1 and 25.

Sort Shopping Search Results By Source Ascending

Shopping Search Results Layout

Grid View

Paragraph View

Hide Thumbnail Images

Favorite Lists

Use the Select column to set your primary favorite list.

Select Favorite List: Set as Primary

| Select * Favorite List Name | Primary | Delete |
|-----------------------------|-------------------------------------|--------|
| Personal Favorites | <input checked="" type="checkbox"/> | |

One Time Address

Add Address Delete Address

Select Alias One Time Address Delete

No results found.

Delivery

* Need By Date Offset 2

* Need By Time 00:00 (Example: 17:30)

* Requester Marines, Gary

* Deliver-To Location CLEVELAND

Deliver to subinventory

Subinventory

Billing

Project

Task

Expenditure Type

Expenditure Org

Expenditure Item Date Offset

Favorite Charge Accounts

Use the Select column to set your primary favorite charge account.

Override Employee Charge Account

TIP iProcurement uses a series of rules to generate charge accounts during checkout. Under certain circumstances, iProcurement gets the charge account from your Employee record in HR. If you select this checkbox and specify a primary favorite charge account, iProcurement will use your Primary Favorite Charge Account instead of the Employee Charge Account.

| Select * Nickname | US Accounting Flexfield | Primary | Delete |
|-------------------|-------------------------|-------------------------------------|--------|
| No results found. | | <input checked="" type="checkbox"/> | |

iProcurement 12.1.3+ – Desktop Receipt Attachments

#C18LV

- Add attachments during receiving transactions.

The screenshot displays the 'Receiving' workflow in iProcurement. The main interface is titled 'Receiving' and shows a progress bar with three steps: 'Select Items', 'Receipt Information', and 'Review And Submit'. The current step is 'Select Items', indicated by a blue dot. Below the progress bar, there are search filters for 'Requester' (Marines, Gary), 'Requisition Number', 'Supplier', 'Order Number', 'Shipment Number', and 'Items Due' (Last 7 Days). A 'Go' button is present. An 'Add Attachment' dialog box is open, showing fields for 'Attachment Type' (Short Text), 'Title', 'Description', 'Category' (From Supplier), and 'Short Text'. The 'Apply' button in the dialog is highlighted with a red arrow. Below the dialog, a table lists items for receipt:

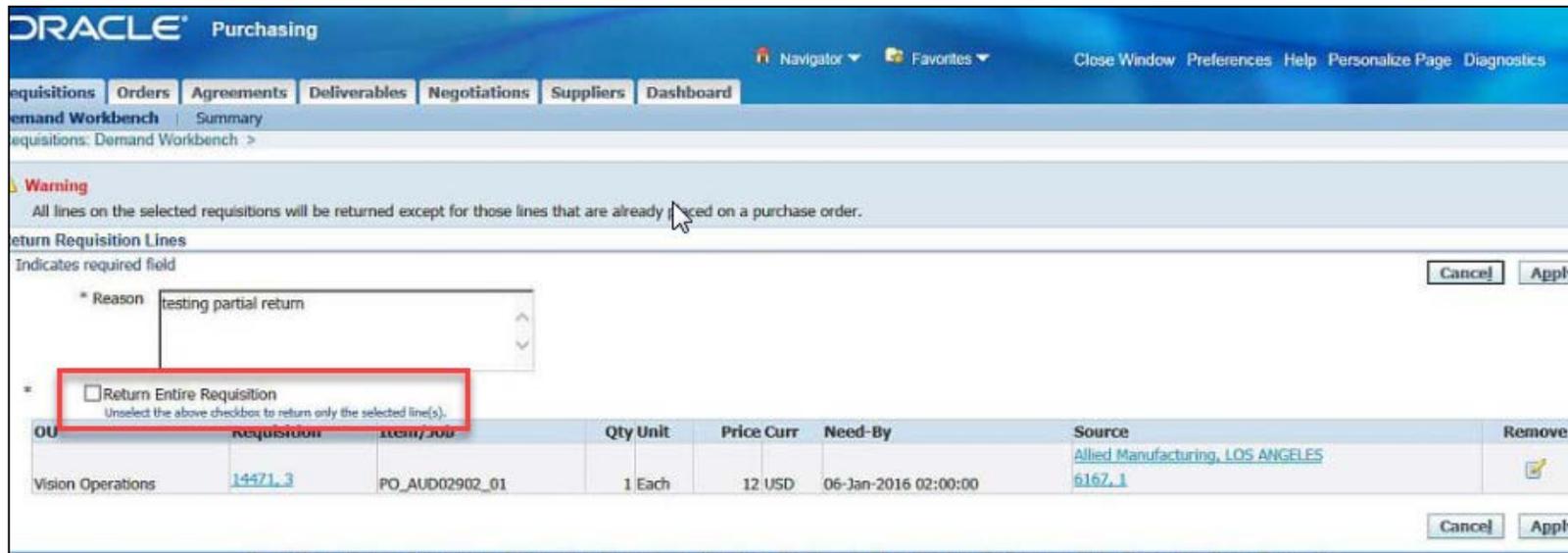
| Select | Requisition | Description | Need-By | Receipt Quantity | Unit | Ordered | Received | Invoiced | Supplier | Order Type | Order Num | Attachments |
|--------------------------|-------------|-------------|----------------------|------------------|------|---------|----------|----------|-------------|------------|-----------|-------------|
| <input type="checkbox"/> | | Testing | 28-Feb-2018 21:05:38 | 1 | EA | 1 | 0 | 0 | O2WORKS LLC | Purchase | 678617 | + [img] |
| <input type="checkbox"/> | | Testing | 28-Feb-2018 21:05:38 | 1 | EA | 1 | 0 | 0 | O2WORKS LLC | Purchase | 678618 | + [img] |

TIP Use the Previous/Next navigation tool to make selections across multiple pages

iProcurement 12.1.3+ – Return Requisition Lines

#C18LV

- Ability to return 1 or more lines from the Buyers Work Center.
 - Not available from forms
 - Must be numeric number in purchasing options



The screenshot shows the Oracle Purchasing interface for returning requisition lines. The top navigation bar includes 'Requisitions', 'Orders', 'Agreements', 'Deliverables', 'Negotiations', 'Suppliers', and 'Dashboard'. The main content area is titled 'Return Requisition Lines' and includes a warning message: 'All lines on the selected requisitions will be returned except for those lines that are already placed on a purchase order.' Below this, there is a form with a 'Reason' dropdown menu set to 'testing partial return'. A checkbox labeled 'Return Entire Requisition' is highlighted with a red box, with a tooltip that reads: 'Unselect the above checkbox to return only the selected line(s)'. At the bottom, a table displays requisition details:

| OU | Requisition | Item / PO# | Qty | Unit | Price | Curr | Need-By | Source | Remove |
|-------------------|-------------|----------------|-----|------|-------|------|----------------------|---|--------|
| Vision Operations | 14471.3 | PO_AUD02902_01 | 1 | Each | 12 | USD | 06-Jan-2016 02:00:00 | Allied Manufacturing, LOS ANGELES 6162_1 | |

iProcurement 12.1.3+ – Attachments in Requisition Change Order Process

#C18LV

- Oracle iProcurement users can now add an attachment when requesting a change on a Requisition that has been converted to a purchase order. Approvers and buyers can then view the attachment.

The screenshot displays the Oracle iProcurement interface. At the top, there are navigation tabs for 'Shop', 'Requisitions', and 'Receiving'. Below these, there are sub-tabs for 'Stores', 'Shopping Lists', and 'Non-Catalog Request'. The main content area shows a 'Change Order 495909 (600.00 USD): Select Lines' with a table of lines. A red box highlights the 'Change Order' title and another red box highlights the '678621' order ID in the table. An 'Add Attachment' dialog box is open in the foreground, with a red arrow pointing to the 'Apply' button. The dialog box contains fields for 'Attachment Type' (set to 'File'), 'Title', and 'Description'. The 'Category' dropdown is open, showing options: 'Internal to Requisition', 'Miscellaneous', 'To Approver', 'To Buyer', 'To Receiver', and 'To Supplier'. There are also 'Browse...', 'Add Another', and 'Apply' buttons.

| Line | Description | Order Type | Order | * Need-By | EA | * | 2 | * | 100 | U... | 200.00 | | Attachments | Reason |
|------|-----------------------------------|------------|--------|---------------|----|---|---|---|-----|------|--------|--|-------------|--------|
| 1 | Testing the line split return | Purchase | 678621 | 03-Mar-2018 0 | EA | * | 2 | * | 100 | U... | 200.00 | | + [img] | |
| 2 | Testing the 2nd line in the split | Purchase | 678621 | 03-Mar-2018 0 | EA | * | 2 | * | 200 | U... | 400.00 | | + [img] | |

iProcurement 12.1.3+ – Other

- Account Generator Support in Requisition Import
- Requisition Update PL/SQL API
- Information templates storage of up to 4000 bytes of data and will preview as an attachment icon in the BWC.
- Custom attributes for Direct Punchout
- Search Capabilities for Smart Forms

#C18LV

iProcurement Highlights 12.2.4



COLLABORATE 18

TECHNOLOGY AND APPLICATIONS FORUM
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iProcurement 12.2.4 – One-Step Checkout

#C18LV

- View contents of shopping cart and submit with single click.

[Shop](#) | [Requisitions](#) | [Receiving](#)

[Stores](#) | [Shopping Lists](#) | [Non-Catalog Request](#)

Non-Catalog Request

[Clear All](#) [Add to Cart](#) [Add to Favorites](#)

* Indicates required field

| | | |
|--------------------|-------------------------------|-----|
| Request Type | NEW - SELECT VALID SMART FORM | ▼ |
| * Item Type | Goods billed by quantity | ▼ ⓘ |
| * Item Description | One Step Checkout! Line 2 | |
| * Category | GOOD.EXPENSE.MATE | 🔍 |
| * Quantity | 1 | |
| * Unit of Measure | EA | ▼ 🔍 |
| * Unit Price | 29.99 | |
| * Currency | USD | ▼ |

RFQ Required
 Negotiated

| | | |
|-----------------|---------------------------------------|-----|
| Contract Number | | ▼ 🔍 |
| | <input type="checkbox"/> New Supplier | |
| Supplier Name | O2WORKS LLC | ▼ 🔍 |
| Site | DALLAS | ▼ 🔍 |
| Contact Name | | |
| Phone | | |
| Supplier Item | XXService | |

Shopping Cart

Your cart contains 2 lines.

Recently Added Lines

| | | |
|--------------------|---|----|
| One Step Checko... | 1 | EA |
| One Step Checkout! | 1 | EA |

[View Cart and Checkout](#)

iProcurement 12.2.4 – One-Step Checkout

- After clicking view cart and checkout button a new window pops up and you can submit from that page.

#C18LV

Shopping Cart

* Description: One Step Checkout!
Justification:
* Need-By Date: 04-Mar-2018 00:00:00
(example: 15-Feb-2018 19:45:00)
* Deliver-To Location: CLEVELAND

Show Delivery and Billing

| Line | Image | Item Description | Unit | Quantity | Price | Amount (USD) | Delete |
|-------|---|-------------------------------|------|----------|-----------|--------------|--------|
| 1 | <input checked="" type="checkbox"/> This is the item's image. | One Step Checkou t! | EA | 1 | 59.99 USD | 59.99 | |
| 2 | <input checked="" type="checkbox"/> This is the item's image. | One Step Checkou t! Line 2 | EA | 1 | 29.99 USD | 29.99 | |
| Total | | | | | | 89.98 | |

Continue Shopping Edit Save Submit

Logged in AS MARINESG

Shopping Cart
Your cart contains 2 lines.
Recently Added Lines
One Step Checko... 1 EA
One Step Checkou! 1 EA
View Cart and Checkout

iProcurement 12.2.4 – One-Step Checkout

#C18LV

- Click edit to see details like approvals and attachments

Shop Requisitions Receiving

Shopping Lists Non-Catalog Request

Edit and Submit Requisition Save Printable Page Submit

* Indicates required field

Requisition 495910

* Description One Step Checkout!
Justification
P-Card Number

Update Copy Delete

| Details | Select | Description | Quantity | Unit | Price | Amount (USD) | Need By Date | Destination Type | Deliver-To Location | Attachment | Update Line | Delete |
|--------------|--------------------------|-------------------------------|----------|------|-----------|--------------|--|------------------|--|------------|-------------|--------|
| | <input type="checkbox"/> | One Step Checkou t! | 1 | EA | 59.99 USD | 59.99 | 04-Mar-2018 00:00:00 <small>(example: 15-Feb-2018 19:45:00)</small> | Expense | CLEVELAND <small>Enter one-time address</small> | | | |
| | <input type="checkbox"/> | One Step Checkou t! Line 2 | 1 | EA | 29.99 USD | 29.99 | 04-Mar-2018 00:00:00 <small>(example: 15-Feb-2018 19:45:00)</small> | Expense | CLEVELAND <small>Enter one-time address</small> | | | |
| Total | | | | | | 89.98 | | | | | | |

Based on your approval authority, this requisition does not require approval by others.

Approvals Manage Approvals

No Approvals Required

Notes And Attachments

Notes

Note To Buyer

Requisition Attachments

Add Attachment...

| Title | Type | Description | Category | Last Updated By | Last Updated | Usage | Update | Delete | Publish to Catalog |
|-------------------|------|-------------|----------|-----------------|--------------|-------|--------|--------|--------------------|
| No results found. | | | | | | | | | |

iProcurement Highlights 12.2.5



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iProcurement 12.2.5 – Retention of One Time Address

#C18LV

- Create a one-time address and save for future use.

* Description

Justification

P-Card Number

| Item | Price | Amount (USD) | Need By Date | Destination Type | Deliver-To Location | Attachment |
|------|--|--------------|---|--|---|------------|
| | <input type="text" value="59.99"/> USD | 59.99 | <input type="text" value="04-Mar-2018 00:00:00"/> <small>(example: 15-Feb-2018 19:45:00)</small> | Expense <input type="button" value="v"/> | <input type="text" value="CLEVELAND"/> Enter one-time address | |
| | <input type="text" value="29.99"/> USD | 29.99 | <input type="text" value="04-Mar-2018 00:00:00"/> <small>(example: 15-Feb-2018 19:45:00)</small> | Expense <input type="button" value="v"/> | <input type="text" value="CLEVELAND"/> Enter one-time address | |

iProcurement 12.2.5 – Retention of One Time Address

#C18LV

- Use existing or create and save a new one.

The screenshot shows the 'One-Time Address' form in the iProcurement system. The form includes a navigation bar with 'Shop', 'Requisitions', and 'Receiving'. Below this are tabs for 'Stores', 'Shopping Lists', and 'Non-Catalog Request'. The main heading is 'One-Time Address'. A note states '* Indicates required field' and 'Enter an address and click Apply when you are done.' The form contains two radio buttons: 'Create New One-Time Address' (selected) and 'Select Existing One-Time Address'. A red callout bubble points to the 'Select Existing One-Time Address' option with the text 'pick an already saved one'. Below the radio buttons are input fields for 'Alias' and '* Deliver-To Address'. At the bottom, there is a checkbox labeled 'Save Address' which is also highlighted with a red box.

iProcurement 12.2.5 – Retention of One Time Address

#C18LV

- Add one time addresses in iProcurement preferences

The screenshot shows the Oracle iProcurement user interface. The top navigation bar includes the Oracle iProcurement logo, a shopping cart icon, a home icon, a clock icon, a star icon, a gear icon, a bell icon, and the text "Logged In As MARINESG". Below the navigation bar, there are tabs for "Shop", "Requisitions", and "Receiving". The main content area is titled "iProcurement Preferences" and includes "Cancel" and "Apply" buttons. The left sidebar contains a menu with "General", "Display Preferences", "Application", "iProcurement Preferences" (selected), and "Requisitions CLM Defaults".

Shopping

* My Favorite Store: No Preference (dropdown)

* Search Results Per Page: 10 (input field)
For best performance, enter a number between 1 and 100.

* Shopping Search Results Per Page: 20 (input field)
For best performance, enter a number between 1 and 25.

Sort Shopping Search Results By: Source (dropdown) Ascending (dropdown)

Shopping Search Results Layout

Grid View
 Paragraph View
 Hide Thumbnail Images

Favorite Lists

Use the Select column to set your primary favorite list.

Select Favorite List: Set as Primary (dropdown) [Add] [Refresh] [Settings] [List Icon]

| Select | * Favorite List Name | Primary | Delete |
|-----------------------|----------------------|-------------------------------------|--------|
| <input type="radio"/> | Personal Favorites | <input checked="" type="checkbox"/> | |

One Time Address

Add Address Delete Address [Add] [Refresh] [Settings] [List Icon]

Select All | Select None

| Select | Alias | * One Time Address | Delete |
|--------------------------|--------------|--------------------------------------|--------|
| <input type="checkbox"/> | Awesome Lane | 1000 Awesome Lane, Awesome, TX 75013 | |

iProcurement 12.2.5 – Generation of Default Requisition Need-by Date

#C18LV

- Default need-by date is generated from the lead time on the Blanket Agreement and or the Item lead time.
 - The application will alert the requestor if an altered need-by date is earlier than the system calculated one.

The screenshot shows the 'Update Line 1' form in the iProcurement system. The form is divided into several sections: 'Operating Unit' (Vision Operations), 'Line Type' (Goods), 'Description', 'Supplier Item', 'Category', 'Shopping Category', 'Price Breaks' (a table with columns for Num, Org, Location, Qty, Break Price, Discount (%), Effective From, Effective To, Delete), 'Item Attributes' (Long Description, Supplier Auxiliary ID, Supplier URL, Manufacturer, Manufacturer URL, Manufacturer Item, Attachment URL, Alias, Lead Time, UNSPSC Code). The 'Lead Time' field is highlighted with a red box.

iProcurement Highlights 12.2.6 & 12.2.7



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iProcurement 12.2.6 –

- Withdrawal of Requester-Initiated Change Requests
 - Ability to remove the pending approval without waiting on the buyer to take action.
- Support for Foreign Currency in Catalog Request
 - Select a transaction currency that is different from the functional currency.

#C18LV

iProcurement 12.2.6 –

- Spot Buy for Privileged Requesters
 - Specify a supplier and a quote price and convert the requisition document into a purchase order automatically. Requisition approval can be automated or routed to appropriate approvers using existing capabilities.
 - Document multiple supplier quotes, assign ranks to quotes, and award to a specific supplier. Eligible requisition lines can be converted into a purchase order automatically.
 - ICX Spot buy role
 - POR: Use Modernized User Interface for Non Catalog Request

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iProcurement 12.2.6 –

#C18LV

- Spot Buy for Privileged Requesters

Update Document Type: Requisition Purchase for Vision Operations

* Indicates required field

* Document Name

Approval **Control**

Owner Can Approve
 Approver Can Modify
 Can Change Forward-To
 Can Change Forward-From
 Can Change Approval Hierarchy

Approval Workflow

Workflow Start Process

Approval Transaction Type

Forward Method

Security Level
Access Level
Autocreate Workflow
Autocreate Workflow Start Process
 Use Contract Agreements for Auto-Sourcing
 Include Non-Catalog Requests

Spot Buy Options

Spending Limit (USD)

Select Object: |

| <input type="checkbox"/> Category | Threshold Limit (USD) | Delete |
|--|-----------------------------------|--------|
| <input type="checkbox"/> SUPPLIES.OFFICE | <input type="text" value="1000"/> | |

iProcurement 12.2.6 –

- Spot Buy for Privileged Requesters

The screenshot displays the iProcurement 12.2.6 interface. At the top, there is a navigation bar with tabs for Shop, Requisitions, Post Award Requests, Receiving, Contractors, Assessments, and Feedback. Below this, there are sub-tabs for Home, Shopping Lists, Non-Catalog Request, and Contractor Request. The main content area is titled "Category Search" and contains a search input field with the text "SUPPLIES.OFFICE" and a "Go" button. Below the search field, there is a table with columns for Category, Description, Commodity, and Spot Buy Threshold Limit (USD). The table currently shows "No search conducted." To the right of the table is a button labeled "Inspect MDS Contents". Below the table, there is a question: "Have you already found a supplier for the goods or services you need?" with three radio button options: "No, I do not know which supplier to use", "Yes, I already have a specific supplier in mind", and "Yes, I have pricing details from multiple suppliers".

Shop Requisitions Post Award Requests Receiving Contractors Assessments Feedback

Home Shopping Lists Non-Catalog Request Contractor Request

Category Search

What category of goods or services do you need to buy? [More Info](#)

| Category | Description | Commodity | Spot Buy Threshold Limit (USD) |
|----------------------|-------------|-----------|--------------------------------|
| No search conducted. | | | |

Have you already found a supplier for the goods or services you need?

- No, I do not know which supplier to use
- Yes, I already have a specific supplier in mind
- Yes, I have pricing details from multiple suppliers

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iProcurement 12.2.6 –

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- Spot Buy for Privileged Requesters

Shop | Requisitions | Post Award Requests | Receiving | Contractors | Assessments | Feedback

Home | Shopping Lists | **Non-Catalog Request** | Contractor Request

Non-Catalog Request

Clear All | Add to Cart | Add to Favorites

* Indicates required field

* What do you need to request?

* Item Description

* Quantity

* Unit of Measure

* Unit Price

* Category: SUPPLIES.OFFICE

RFQ Required

Negotiated

Supplier Item

Currency: USD

Automatically create a Purchase Order when my requisition is approved

Find your Supplier

Contract Number

Supplier Name

Site

Contact Name

Phone

Supplier Status

If you cannot find your supplier [click here to setup a new supplier.](#)

Shopping Cart

Your cart contains 1 line.

Recently Added Lines

| | | |
|--------------------|---|----|
| Testing attachment | 1 | EA |
|--------------------|---|----|

[View Cart and Checkout](#)

iProcurement 12.2.7 –

- New supplier Onboarding for Non-Catalog Request
 - the requester can send an email to the supplier inviting them to register on the company's portal. The supplier will have to provide all information necessary for registration and will go through the standard approval process within iSupplier Portal / Supplier Lifecycle Management.

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iProcurement 12.2.7 –

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- New supplier Onboarding for Non-Catalog Request

Shop | Requisitions | Post Award Requests | Receiving | Contractors | Assessments | Feedback

Home | Shopping Lists | **Non-Catalog Request** | Contractor Request

* Indicates required field

Onboard New Supplier

Primary Details

Registration Purpose: Non-Catalog Request

* Supplier Name:

* Justification:

Onboarding Supplier Policy

Suppliers On Boarding Policy News

This region is a placeholder for customers to provide content pertaining to their organization's policies/processes.

Address

* Address Name:

Country: United States

* Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

* City/Town/Locality:

County:

* State/Region:

Province:

* Postal Code:

I agree to the terms and conditions in order to onboard a new supplier

Contact

First Name:

* Last Name:

Phone Area Code:

Phone:

Phone Extension:

Fax Area Code:

Fax:

* Email:

Cancel | Create Supplier | Invite Supplier

iProcurement 12.2.7 –

- View charge account details in the requisition approval notification.
 - See charge account without logging into application
 - Also available in mobile apps
- Web Services for Requisition creation
 - Importing requisitions

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Thanks! Q&A

gmarines@o2works.com

Session ID:

10421

Remember to complete your evaluation for this session within the app!

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O2Works is one of the leading E-Business Suite services providers offering the most experienced teams of functional and technical consultants in the industry. Our hands-on **resources average 19+ years of experience** focused exclusively on implementing, upgrading, integrating, and extending Oracle's E-Business Suite. Stop by and talk to us about our large portfolio of successful projects.

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