



COLLABORATE18

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, LLC.

@O2Works_Gary

April 24, 2018 11-12PM

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

#C18LV

About The Presenter

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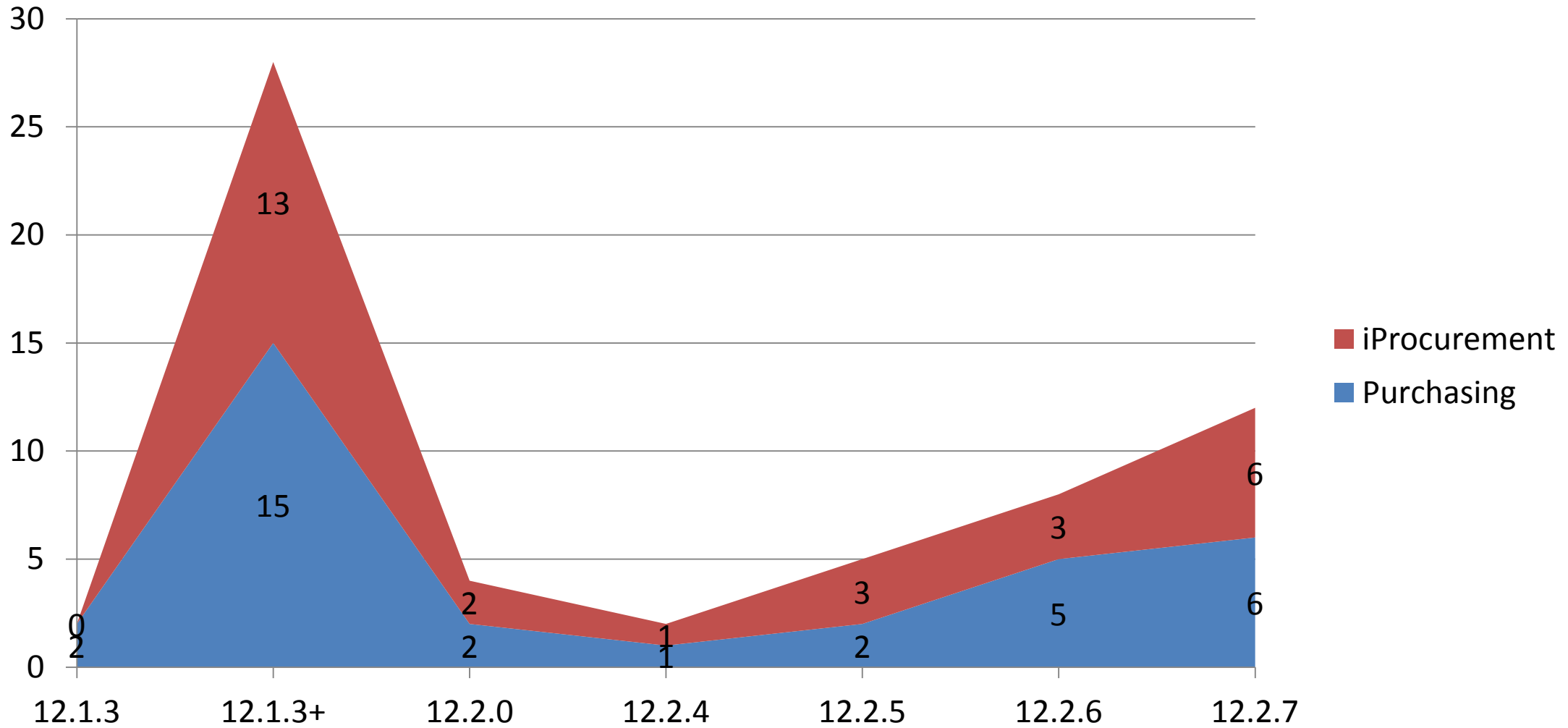


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Putting Oracle to work

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!

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+

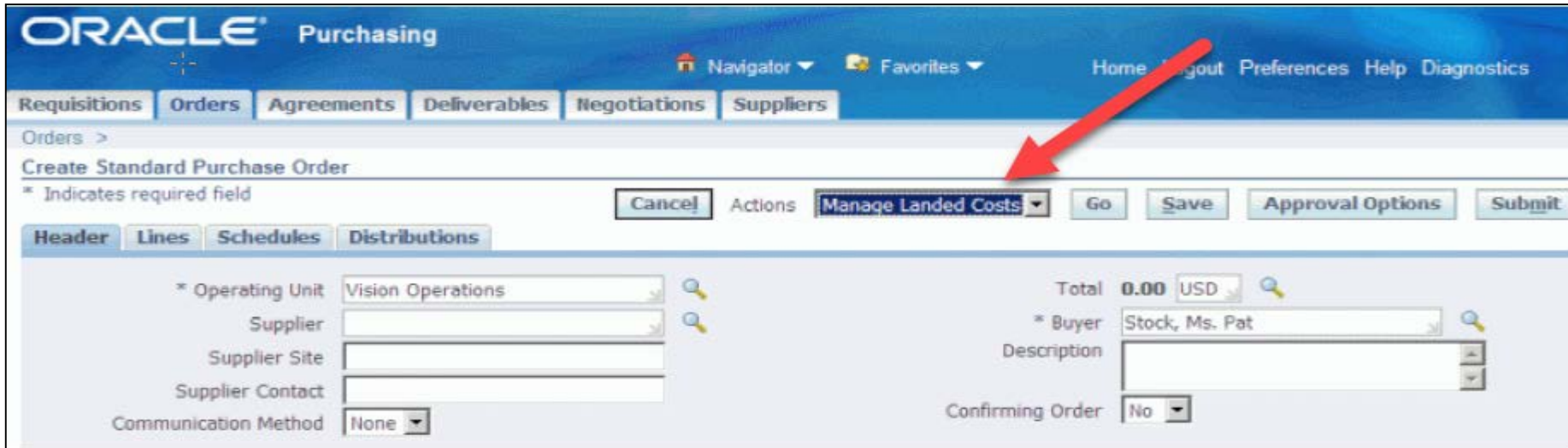


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Purchasing 12.1.3 – Landed Cost Management

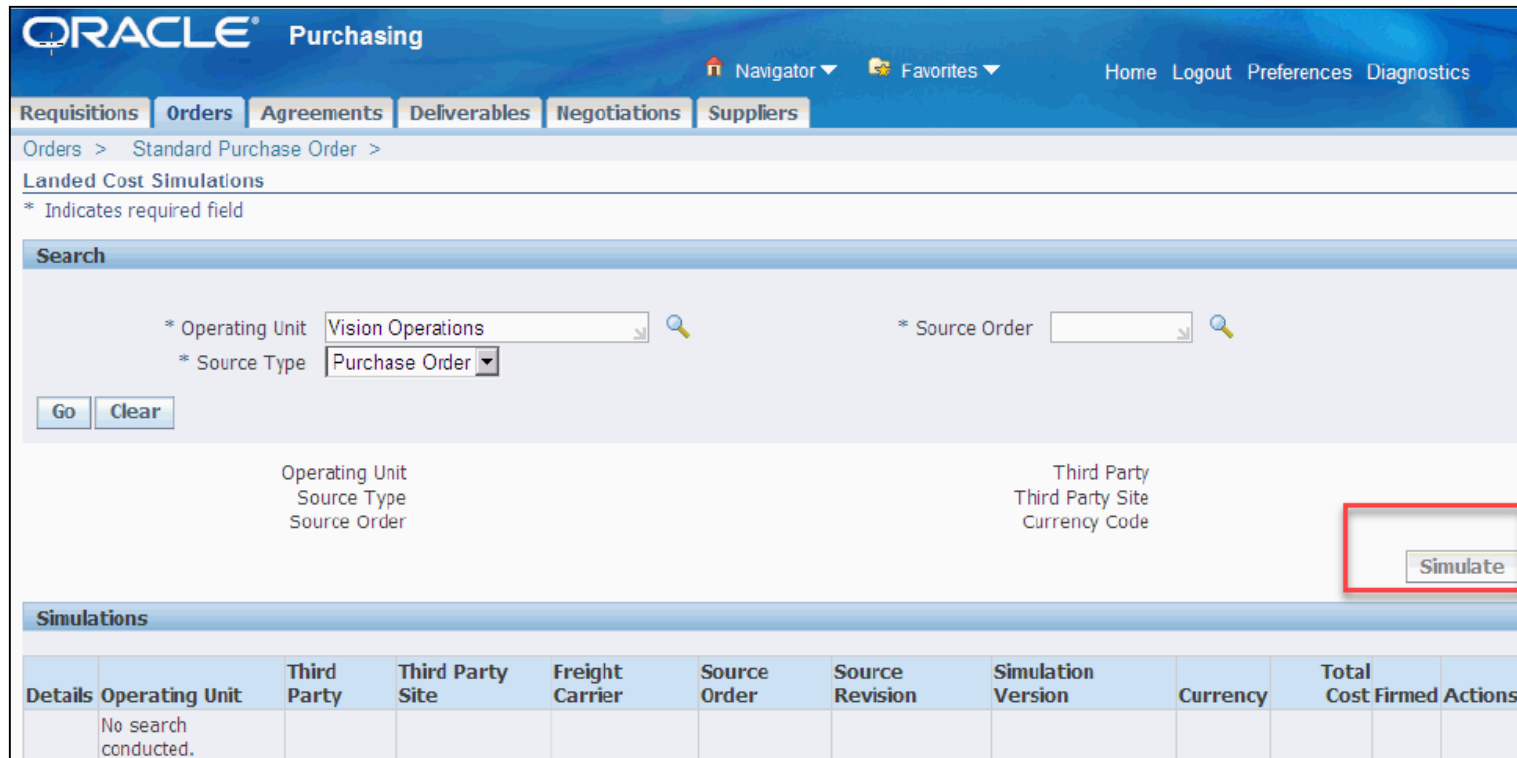
- Oracle Landed Cost Management Integration
 - Value goods at their actual cost
 - Take freight, taxes, and insurance into consideration



The screenshot shows the Oracle Purchasing interface for creating a standard purchase order. The top navigation bar includes 'Requisitions', 'Orders', 'Agreements', 'Deliverables', 'Negotiations', and 'Suppliers'. The 'Orders' tab is active. Below the tabs, the 'Create Standard Purchase Order' form is displayed. A red arrow points to the 'Manage Landed Costs' button in the 'Actions' menu. The form includes fields for '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).

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	Firm Actions
No search conducted.										

Purchasing 12.1.3 + Approvals Management Engine


- AME integration with Purchasing Documents


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

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	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

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

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

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

The screenshot displays the Oracle Purchasing interface. At the top, a navigation bar includes tabs for Requisitions, Orders, Agreements, Deliverables, Negotiations, Suppliers, Awards, and IDVs. The 'Agreements' tab is selected, and a breadcrumb trail shows 'Agreements > Blanket Purchase Agreement 678612'. Below this is a 'Search' button. The main content area has sub-tabs for Header, Lines, and Controls, with 'Lines' selected. A table lists the agreement lines. Line 1 is highlighted, showing it is an 'Outside Processing - CS' item. A red arrow points to the 'Type' column header, and another red box highlights the 'Outside Processing - CS' value. 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

- 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.

Purchasing Highlights 12.2, 12.2.4 and 12.2.5



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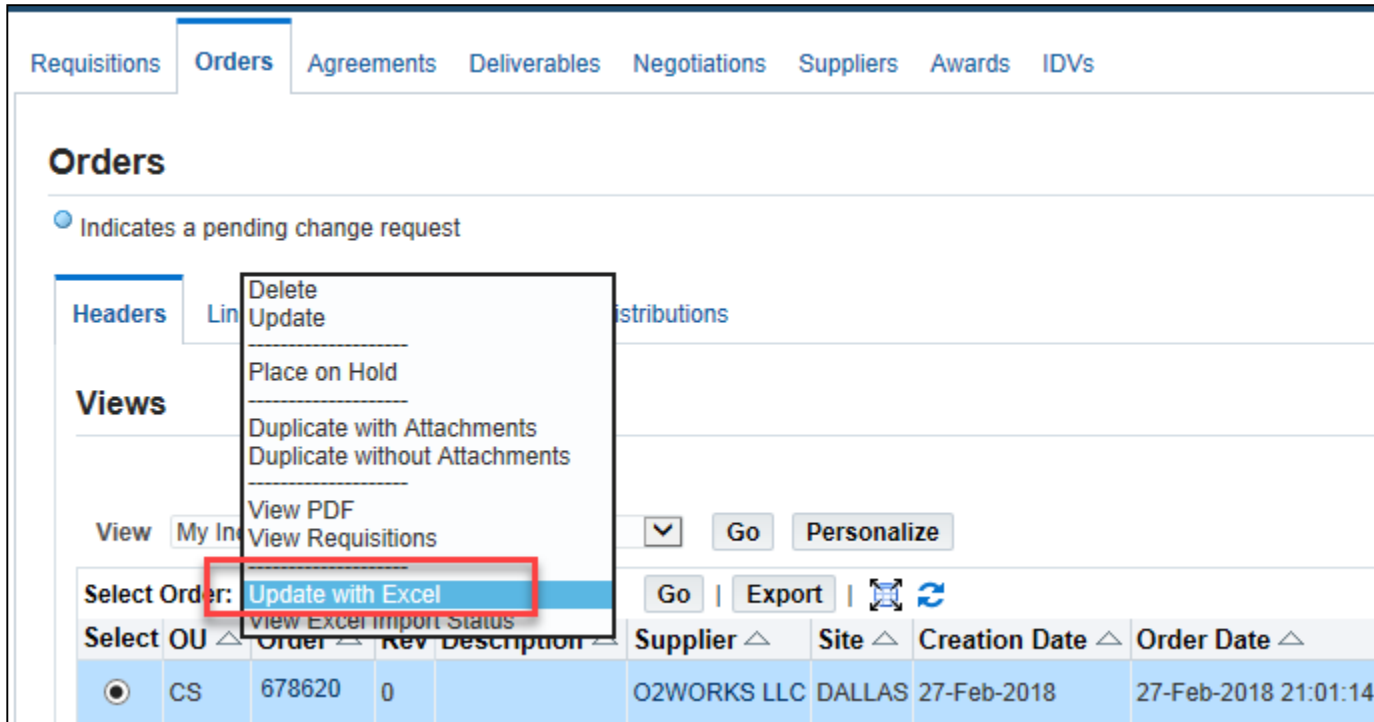
Purchasing 12.2

- 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

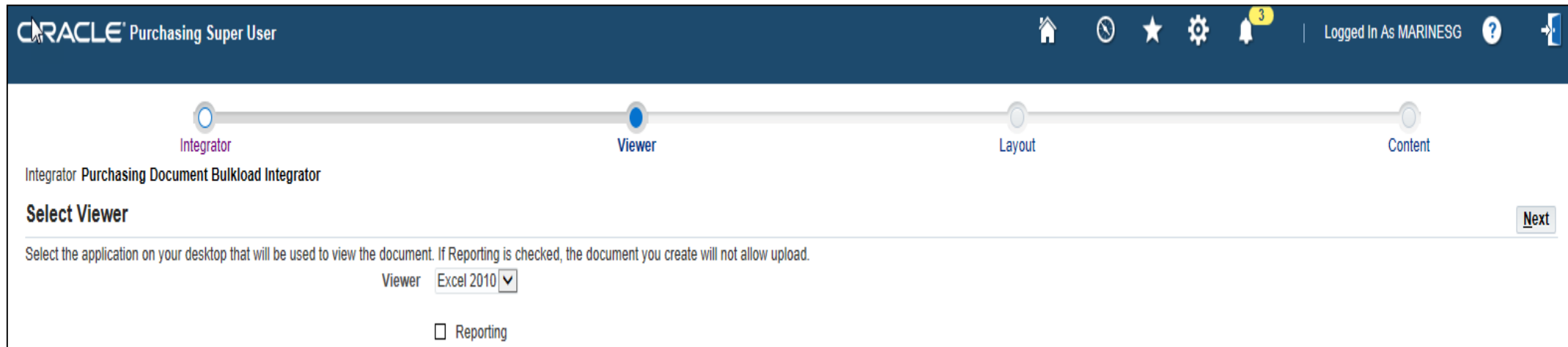


The screenshot displays the Oracle Purchasing application interface. At the top, a navigation bar includes tabs for Requisitions, Orders, Agreements, Deliverables, Negotiations, Suppliers, Awards, and IDVs. The 'Orders' tab is currently selected. Below the navigation bar, the 'Orders' section is visible, featuring a legend indicating that a blue circle icon represents a pending change request. On the left side, there are sections for 'Headers' and 'Views'. The 'Views' section includes a 'View' dropdown menu set to 'My In' and a 'Select Order:' dropdown menu. The 'Select Order:' dropdown is open, showing a list of actions: Delete, Update, Place on Hold, Duplicate with Attachments, Duplicate without Attachments, View PDF, View Requisitions, and 'Update with Excel'. The 'Update with Excel' option is highlighted with a red rectangle. Below the dropdown, there are buttons for 'Go', 'Export', and 'Personalize'. At the bottom, a table lists order details with columns for Select, OU, Order, Rev, Description, Supplier, Site, Creation Date, and Order Date. The first row shows an order for O2WORKS LLC in DALLAS, created on 27-Feb-2018.

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 with four steps is visible: "Integrator" (inactive), "Viewer" (active), "Layout" (inactive), and "Content" (inactive). Below the progress bar, the section is titled "Select Viewer". A message states: "Select the application on your desktop that will be used to view the document. If Reporting is checked, the document you create will not allow upload." There is a dropdown menu labeled "Viewer" with "Excel 2010" selected. Below this is a checkbox labeled "Reporting" which is currently unchecked. A "Next" button is located in the top right corner of the form area.

ORACLE[®] Purchasing Super User

Integrator Purchasing Document Bulkload Integrator

Select Viewer

Select the application on your desktop that will be used to view the document. If Reporting is checked, the document you create will not allow upload.

Viewer Excel 2010

☐ Reporting

Next

Purchasing 12.2.4 – Update with Excel

- Download the order

The screenshot shows the Oracle Purchasing application interface. A 'Download' dialog box is open in the center, displaying a 'Confirmation' message: 'The download process has completed successfully. Press Close to return to the document.' The dialog has a 'Close' button. In the background, the Oracle Purchasing window is visible, showing a form with fields for 'Result Format Usage 1', 'Batch Id', 'Operating Unit', 'Status', 'Total', 'Document Name', 'Document Number', 'Buyer Name', 'Supplier', 'Supplier Site', and 'Approved Date'. Below the form is a table with columns: 'Upl', 'Line Number', 'Line Type', 'Item Number', 'Item', 'nt', 'Need-by Date', and 'Promise'. The table contains two rows of data: '1 Goods' and '2 Goods', both with a 'Need-by Date' of '2/28/2018'.

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

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- Add rows

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Result Format Usage	6
Batch Id	6

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

Upl	Line Number	Line Type	Item Number	Item Revision	Item Description	Category	Quantity	Unit Of Measure	Unit Price	Amount	Need-by Date	Pre
	Number	List - Text	List - Text	List - Text	Text	List - Text	Number	List - Text	Number	Number	List - Date	List
	1	Goods			Testing	DEFAULT.DEFAULT	1	EA		10	2/28/2018	
	2	Goods			Testing 2	DEFAULT.DEFAULT	2	EA		100	2/28/2018	
Pz	3	Goods			Testing 3	DEFAULT.DEFAULT	5	EA		7	2/28/2018	

Add your rows

Purchasing 12.2.4 – Update with Excel

- Upload some or all lines based on flag

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

Purchasing Document Upload Page

Please specify upload parameters for Purchasing Documents

Rows to Upload

☐ All Rows

☒ Flagged Rows

☒ Validate Before Upload

☒ Automatically Submit Import

Import will be automatically submitted on successful completion of the upload

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

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

The screenshot shows the 'Purchasing Options' configuration page for Operating Unit 'UL LLC'. The page is divided into several sections:

- Document Control:** Includes fields for Price Tolerance (%), Price Tolerance Amount (USD), Enforce Full Lot Quantity (set to 'Advisory'), Receipt Close Point (set to 'Received'), Cancel Requisitions (set to 'Optionally'), SBI Buying Company Identifier, Output Format (set to 'PDF'), Maximum Attachment Size (in MB) (set to '10'), and Email Attachment Filename (set to 'Attachments.zip').
- Document Defaults:** Includes fields for Requisition Import Group-By (set to 'All'), Internal Requisition Order Type (set to 'UL LLC Stands'), Internal Requisition Order Source (set to 'Internal'), Receipt Close Tolerance (%) (set to '2'), Invoice Close Tolerance (%) (set to '2'), and a red box highlighting 'Acknowledgement Required' (set to 'None') and 'Acknowledgment Lead Time (Days)'. Other fields include Line Type (Goods), Rate Type (Corporate), Match Approval Level (3 Way), Price Break Type (Cumulative), Price Type, Minimum Release Amount (USD), and Buyer.
- Receipt Accounting:** Includes fields for Accrue Expense Items (Period End), Accrue Inventory Items (At Receipt), and Automatic Offset Method (None).

At the bottom right, there is a section for 'Expense AP Accrual Account' with the value '720 20110.00000.00000.000.0.0.0' and a small icon.

Purchasing 12.2.6 – PO Approval Attachments

- 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	TRAINSMART 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 approver
1	Cady, Robert (Bob)	03/20/2018	Submit	Justification to approver

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

- 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>

Purchasing 12.2.7 – Automate Grouping of Multiple Requisitions for PO Creation

- 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 Oracle Forms windows. The background window is titled 'Submit Request' and contains the following fields and controls:

- Run this Request** section:
 - Name:** Create Standard Purchase Orders
 - Operating Unit:** Vision Operations
 - Parameters:** (empty text field)
 - Language:** American English
 - Buttons:** Copy, Language Settings, Debug Options
- At these Times** section:
 - Run the Job:** As Soon as Possible
- Upon Completion** section:
 - ☒ Save all Output Files
 - Layout:** (empty text field)
 - Notify:** (empty text field)
 - Print to:** noprint
 - Buttons:** Help (C), Submit, Cancel

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

- Group Header:** VENDOR (with a dropdown arrow and 'Vendor' text)
- Group Order Lines:** Yes
- Approval Status:** INCOMPLETE (with a dropdown arrow and 'Incomplete' text)
- Buttons:** OK, Cancel, Clear, Help

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

Requisitions | Initiatives | Negotiations | Orders | Agreements | Deliverables | Suppliers | Awards | IDVs

Demand Workbench | Summary | Amendments

Requisitions: Demand Workbench >

Demand Workbench

* Indicates required field

Search

Match ☐ All ☐ My ☐ Others

Req

Category is

Supplier

Add Another

Select Requests: | |

<input checked="" type="checkbox"/>	OU ^	Requisition ^	Item/Job	Qty	Unit	Price	Curr ^	Need-By ^	Source	Actions
<input checked="" type="checkbox"/>	Vision Operations	14278, 4	SB88328	250	Each	8	USD	31-Oct-2008 00:00:00		<input type="button" value="Grid"/> <input type="button" value="Print"/> <input type="button" value="Email"/> <input type="button" value="Details"/>
<input checked="" type="checkbox"/>	Vision Operations	14278, 3	SB88328	250	Each	8	USD	30-Sep-2008 00:00:00		<input type="button" value="Grid"/> <input type="button" value="Print"/> <input type="button" value="Email"/> <input type="button" value="Details"/>
<input checked="" type="checkbox"/>	Vision Operations	14278, 2	SB88328	250	Each	8	USD	31-Aug-2008 00:00:00		<input type="button" value="Grid"/> <input type="button" value="Print"/> <input type="button" value="Email"/> <input type="button" value="Details"/>
<input checked="" type="checkbox"/>	Vision Operations	14278, 1	SB88328	250	Each	8	USD	31-Jul-2008 00:00:00		<input type="button" value="Grid"/> <input type="button" value="Print"/> <input type="button" value="Email"/> <input type="button" value="Details"/>

iProcurement Highlights 12.1.3+



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iProcurement 12.1.3+ – Charge Account

- 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

Shopping

* My Favorite Store: No Preference

* Search Results Per Page: 10

* Shopping Search Results Per Page: 20

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

Personal Favorites

One Time Address

Add Address Delete Address

Select Alias

One Time Address

Delivery

* Need By Date Offset: 2

* Need By Time: 00:00

* Requester: Marines, Gary

* Deliver-To Location: CLEVELAND

Deliver to 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

iProcurement 12.1.3+ – Desktop Receipt Attachments

- Add attachments during receiving transactions.

The screenshot displays the iProcurement 12.1.3+ Desktop Receipt Attachments interface. The main window is titled 'Receiving' and features a progress bar with three steps: 'Select Items', 'Receipt Information', and 'Review And Submit'. The 'Select Items' step is currently active. 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 located below these filters. An 'Add Attachment' modal is open, showing fields for 'Attachment Type' (Short Text), 'Title', 'Description', 'Category' (From Supplier), and 'Short Text'. A red arrow points to the 'Apply' button in the modal. The main window also displays a table with columns: Select Requisition, Description, Need-By, Receipt Quantity, Unit, Ordered, Received, Invoiced, Supplier, Order Type, and Order Number. The table contains two rows of data for 'Testing' items.

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

iProcurement 12.1.3+ – Return Requisition Lines

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

ORACLE® Purchasing

Requisitions | Orders | Agreements | Deliverables | Negotiations | Suppliers | Dashboard

Demand Workbench | Summary

Requisitions: Demand Workbench >

Warning
All lines on the selected requisitions will be returned except for those lines that are already placed on a purchase order.

Return Requisition Lines
Indicates required field

* Reason: testing partial return

* ☐ Return Entire Requisition
Unselect the above checkbox to return only the selected line(s).

OU	Requisition	PO Number	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 6167, 1	

iProcurement 12.1.3+ – Attachments in Requisition Change Order Process

- 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.

ORACLE iProcurement

Shop Requisitions Receiving

Stores Shopping Lists Non-Catalog Request

Enter Changes

Change Order 495909 (600.00 USD): Select Lines

For lines with multiple distributions, click on the Quantity link to change quantity

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		+2	
2	Testing the 2nd line in the split	Purchase	678621	03-Mar-2018 0	EA	*	2	*	200	U...	400.00		+2	

TIP Note that not all lines may be eligible for changes.

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

iProcurement Highlights 12.2.4



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iProcurement 12.2.4 – One-Step Checkout

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

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

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

Non-Catalog Request

* 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

🔍

☐ New Supplier

Supplier Name

O2WORKS LLC

🔍

Site

DALLAS

🔍

Contact Name

Phone

Supplier Item

XXService

Clear All

Add to Cart

Add to Favorites

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.

Shopping Cart

* Description: One Step Checkout!

Justification:

* Need-By Date: 04-Mar-2018 00:00:00
(example: 15-Feb-2018 18:45:00)

* 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

View Cart and Checkout

iProcurement 12.2.4 – One-Step Checkout

- Click edit to see details like approvals and attachments

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

[Stores](#) [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](#) [Refresh](#)

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 (example: 15-Feb-2018 19:45:00)	Expense	CLEVELAND Enter one-time address	+	✎	✖
▶	<input type="checkbox"/>	One Step Checkou t! Line 2	1	EA	29.99 USD	29.99	04-Mar-2018 00:00:00 (example: 15-Feb-2018 19:45:00)	Expense	CLEVELAND Enter one-time address	+	✎	✖
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

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

* Description

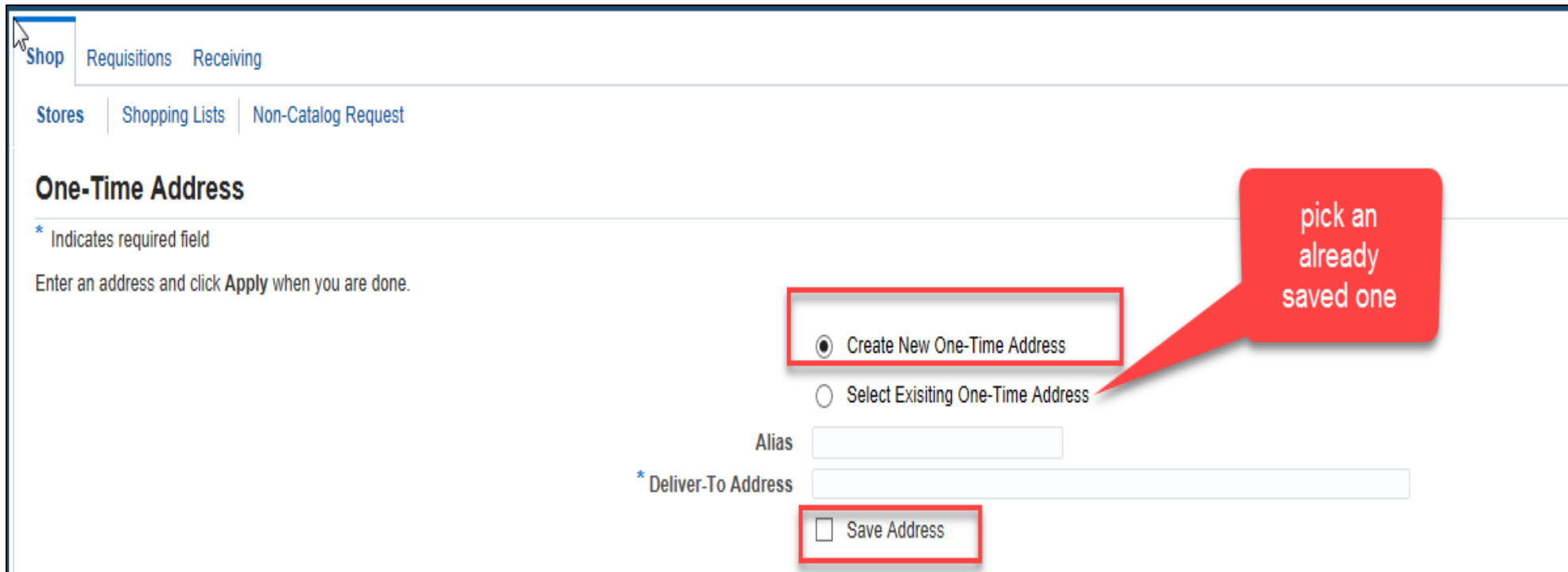
Justification

P-Card Number

Item	Price	Amount (USD)	Need By Date	Destination Type	Deliver-To Location	Attachment	Unit
	59.99 USD	59.99	04-Mar-2018 00:00:00 <small>(example: 15-Feb-2018 19:45:00)</small>	Expense ▼	CLEVELAND <u>Enter one-time address</u>		
	29.99 USD	29.99	04-Mar-2018 00:00:00 <small>(example: 15-Feb-2018 19:45:00)</small>	Expense ▼	CLEVELAND Enter one-time address		

iProcurement 12.2.5 – Retention of One Time Address

- Use existing or create and save a new one.



The screenshot shows the 'One-Time Address' form in the iProcurement system. The form has a navigation bar at the top with 'Shop', 'Requisitions', and 'Receiving'. Below this is a sub-navigation bar with '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 speech bubble points to the 'Select Existing One-Time Address' option with the text 'pick an already saved one'. Below the radio buttons are two text input fields: 'Alias' and '* Deliver-To Address'. At the bottom, there is a checkbox labeled 'Save Address' which is also highlighted with a red box.

Shop Requisitions Receiving

Stores Shopping Lists Non-Catalog Request

One-Time Address

* Indicates required field

Enter an address and click Apply when you are done.

☒ Create New One-Time Address

☐ Select Existing One-Time Address

pick an already saved one

Alias

* Deliver-To Address

☐ Save Address

iProcurement 12.2.5 – Retention of One Time Address

- Add one time addresses in iProcurement preferences

ORACLE iProcurement

Shop Requisitions Receiving

General

Display Preferences

Application

iProcurement Preferences

Requisitions CLM Defaults

iProcurement Preferences

* Indicates required field

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
<input type="radio"/>	Personal Favorites	<input checked="" type="checkbox"/>	

One Time Address

Add Address Delete Address

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

- 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.

Requisitions Initiatives Negotiations Orders **Agreements** Deliverables Suppliers Awards IDVs

Agreements > Create Blanket Purchase Agreement >
Update Line 1

* Indicates required field

Operating Unit Vision Operations

* Line Type Goods

* Item

* Description

Supplier Item

* Category

Shopping Category

Price Breaks

* Num	Org	Location	Qty	* Break Price	Discount (%)	Effective From	Effective To	Delete
No results found.								

[Inspect MDS Contents](#)

Item Attributes

Long Description

Supplier Auxiliary ID

Supplier URL

Manufacturer

Manufacturer URL

Manufacturer Item

Attachment URL

Alias

Lead Time

UNSPSC Code

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.

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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

iProcurement 12.2.6 –

- 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

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

Approval Workflow
Workflow Start Process
Approval Transaction Type
Forward Method

Spot Buy Options

Spending Limit (USD)

Select Object: |

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

iProcurement 12.2.6 –

- Spot Buy for Privileged Requesters

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

iProcurement 12.2.6 –

- 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

* Currency

Category: SUPPLIES.OFFICE

☐ RFQ Required

☐ Negotiated

Supplier Item

☐ 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.

iProcurement 12.2.7 –

- 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

Cancel | Create Supplier | Invite Supplier

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:

* Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

* City/Town/Locality:

County:

* State/Region:

Province:

* Postal Code:

Contact

First Name:

* Last Name:

Phone Area Code:

Phone:

Phone Extension:

Fax Area Code:

Fax:

* Email:

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