

iProcurement Requisitioner Training

Student Guide

P2P - Edition 1.0

AUG 2005

agere systems

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Preface

Profile

Before You Begin This Course

Before you begin this course, you should have the following qualifications:

- Working experience with Purchasing

Prerequisites

- Oracle Navigation

How This Course Is Organized

iProcurement Requisitioner Training is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

Typographic Conventions in Oracle Application Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select **Invoice** then **Entry** then **Invoice Batches Summary**.
2. (M) From the menu, select **Query** then **Find**.
3. (B) Click the **Approve** button.

Notations:

(N) = Navigator

(M) = Menu

(T) = Tab

(B) = Button

(I) = Icon

(H) = Hyperlink

(ST) = Sub Tab

Typographical Conventions in Oracle Application Help System Paths

This course uses a “navigation path” convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

(Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.
2. Under the General Ledger entry, expand Journals.
3. Under Journals, select Enter Journals.

4. Review the Enter Journals topic that appears in the document frame of the help system window.

Help Desk

For Oracle and Software support:

Call the Global Service Desk 1-610-712-8800 or 1-877-2RESOLV (1-877-273-7658)

iProcurement Requisitioner

Chapter 1

Section Objectives

At the end of this section, you should be able to:

- Setting iProcurement Preferences
- Create an iProcurement Requisition
- Create an iProcurement Requisition to Request an RFQ
- Receiving in iProcurement
- Additional iProcurement Information

Setting iProcurement Preferences

Setting iProcurement Preferences

iProcurement

N > Preferences > (ST) iProcurement Preferences

iProcurement Preferences

In iProcurement, fields that are required by the system are marked with an asterisk (*).

1. Select a default Favorite Store.

It is recommended that you select Main Store because this will include all of the local catalog content.

Oracle iProcurement: Preferences - Microsoft Internet Explorer

File Edit View Favorites Tools Help eFax

Address http://crpf4e.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/procurement/webui/MyProfilePG&ti=1342350964&oaapc=6&OAPF=71395_231_0&menu=Y&oaMenuLev...

Google Search Web Site popups allowed Options

ORACLE iProcurement Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving

User Preferences
• General
• Access Requests
• Application
• iProcurement Preferences

iProcurement Preferences

* Indicates required field

Clear Changes Apply Changes

Shopping

* My Favorite Store Main Store

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

* Shopping Search Results Per Page 7
For best performance, enter a number between 1 and 25.
 Hide Thumbnail Images

Delivery

* Need By Date Offset 7

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

* Requester Peskin, Todd Evan

* Deliver-To Location 101030

Billing

Project

Task

Expenditure Type

Expenditure Org

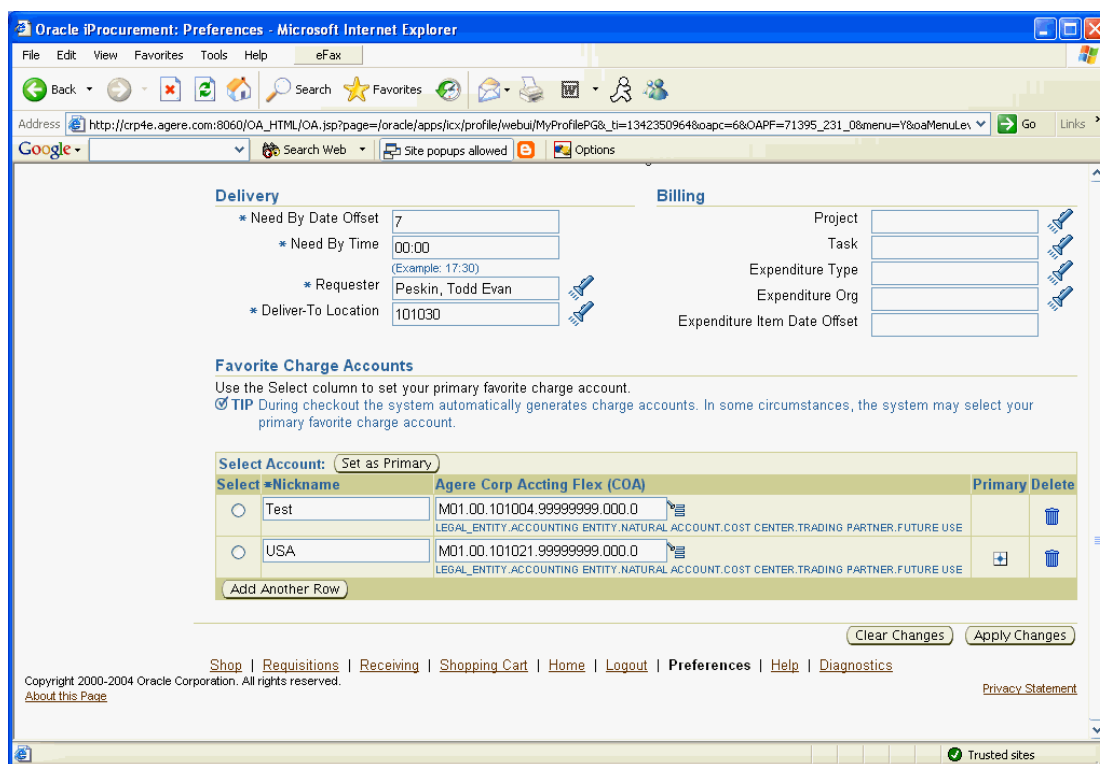
Expenditure Item Date Offset

Favorite Charge Accounts

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

TIP During checkout the system automatically generates charge accounts. In some circumstances, the system may select your primary favorite charge account.

Done Trusted sites



2. Specify the number of Search Results Per Page.

This defines the maximum number of records per page that are returned when displaying list of requisitions, receipts, list of values, etc.

3. Specify the number of Shopping Search Results Per Page.

This defines the maximum number of records per page that are returned when searching for items in the iProcurement catalog.

4. Select Hide Thumbnail Images if you do not want catalog item images to be displayed in the search results list.

5. Enter the default Delivery information.

Need By Date Offset - state the number of days that should be added to the current date when determining the need by date.

Need By Time - default time to use for the need by date.

Requestor - the default requestor to use for each requisition line.

If a field has a flashlight icon, then there is a list of values (LOV) associated with the field. You can either click on the flashlight icon or enter part of the value and press the Tab key. The system will then provide a list of valid values. When searching for a value, Oracle's wildcard character, '%', can be used. The '%' character matches 0 or more characters. For example, searching for 'h%ware' will match 'hardware'.

Deliver-To Location - the default deliver-to location to use for each requisition line. This will default based on the selected Requestor.

6. Enter the default Billing information.
7. Define Favorite Charge Accounts if desired.
 - Click (B) Add Another Row for each charge account.
 - Enter a nickname for each account.
 - Specify the appropriate charge account.
 - Select one favorite charge account and click (B) Set as Primary.

This is a required step. The default charge account for the employee will still default on each requisition line even if a primary favorite charge account is defined.

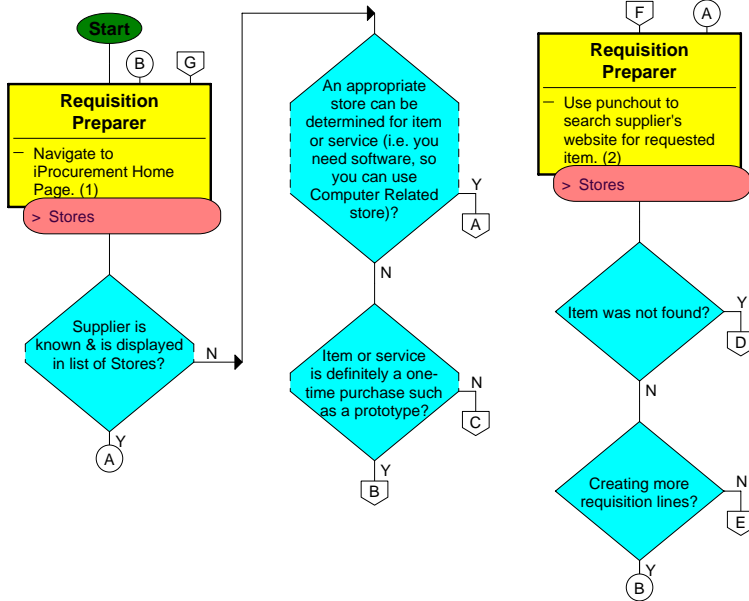
8. Click (B) Apply Changes.

End of activity.

Creating an iProcurement Requisition

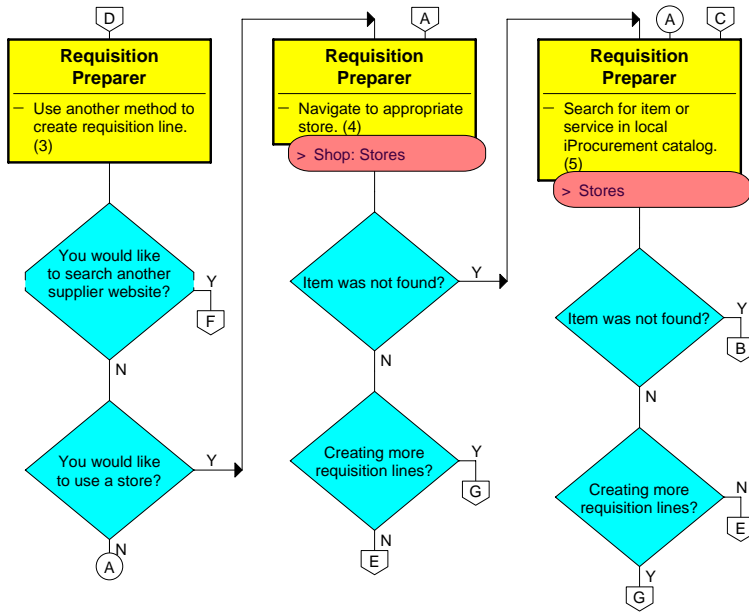
Create an iProcurement Requisition

Create an iProcurement Requisition



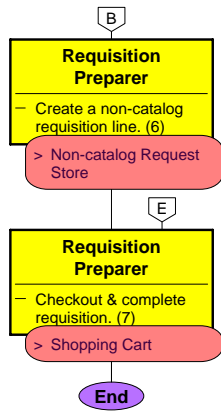
Create an iProcurement Requisition

Create an iProcurement Requisition



Create an iProcurement Requisition

Create an iProcurement Requisition

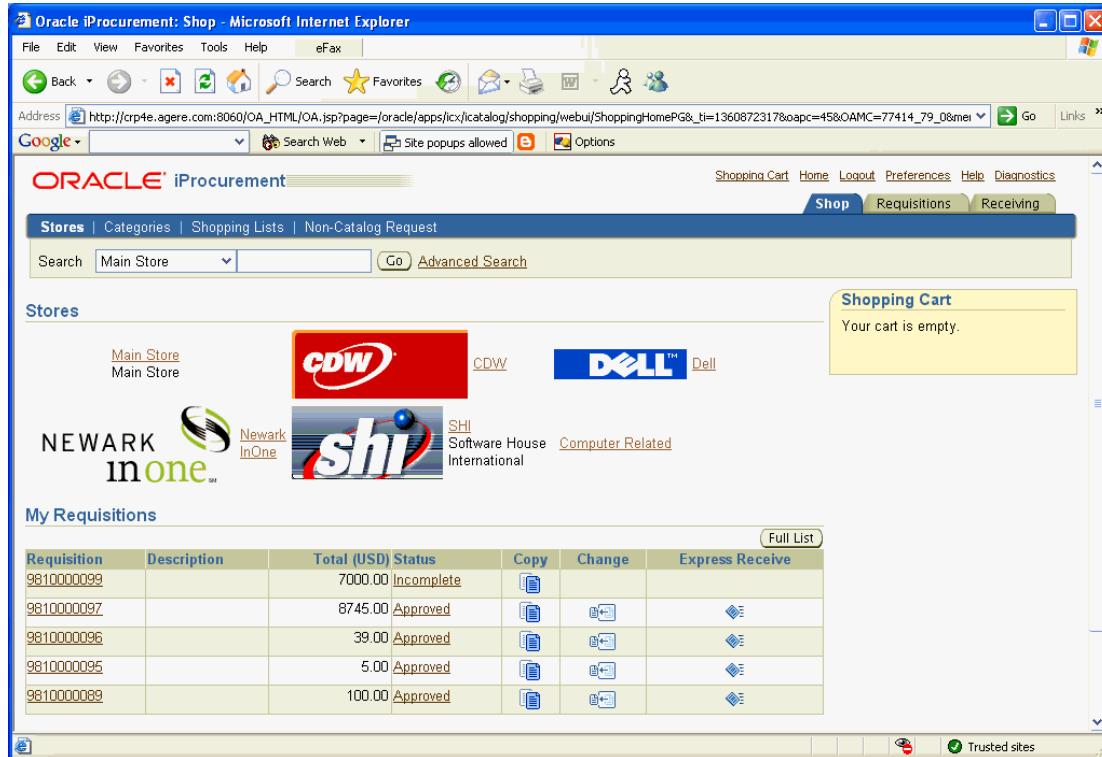


Search a Supplier Website Using Punchout

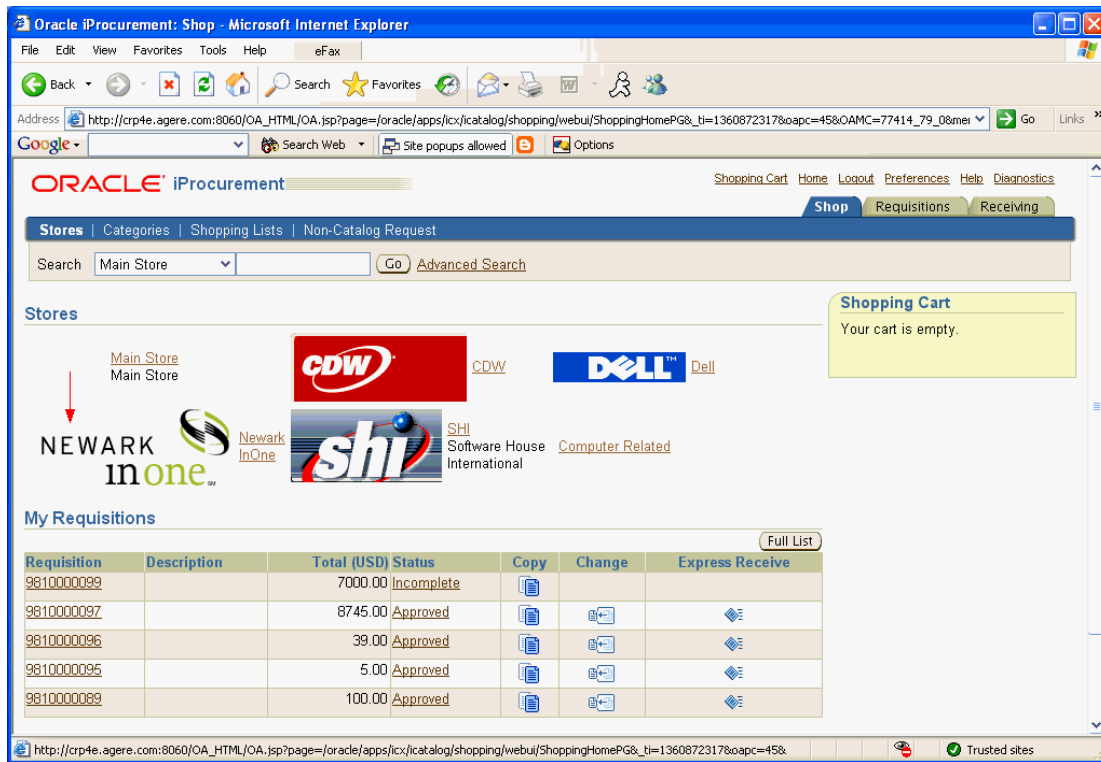
iProcurement

N > iProcurement > (ST) Shop > (ST) Stores

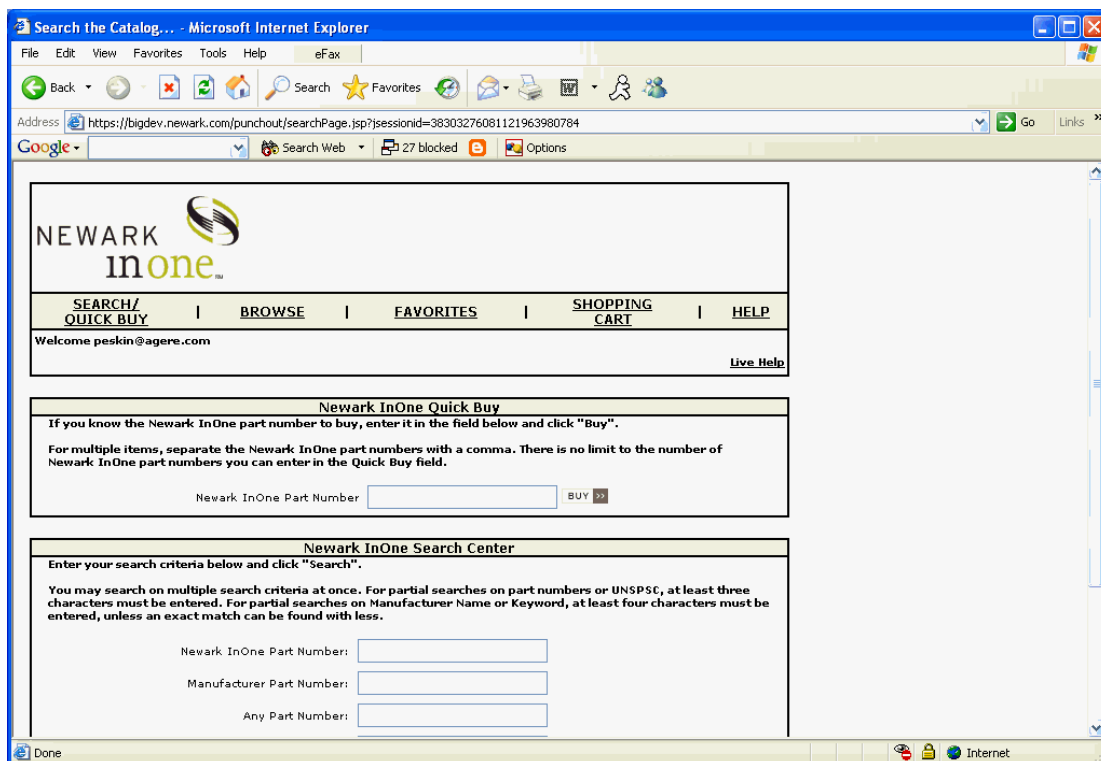
Stores

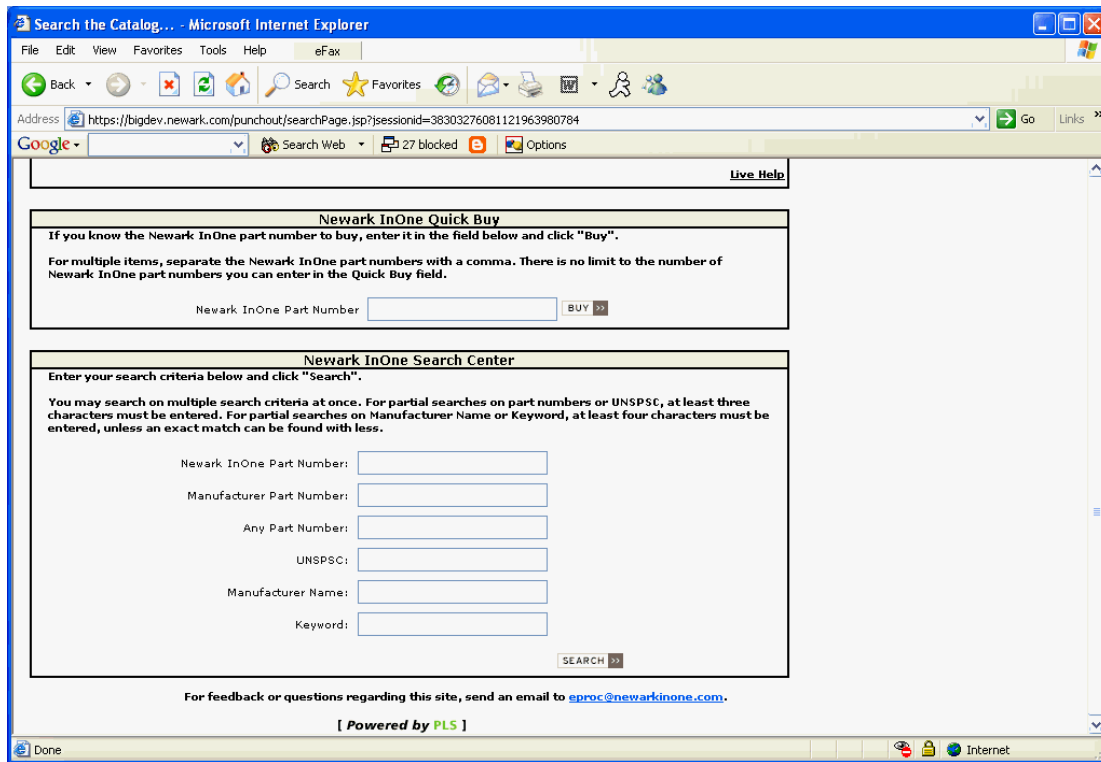


1. Click on the image or link for the appropriate supplier in order to begin a supplier punchout.

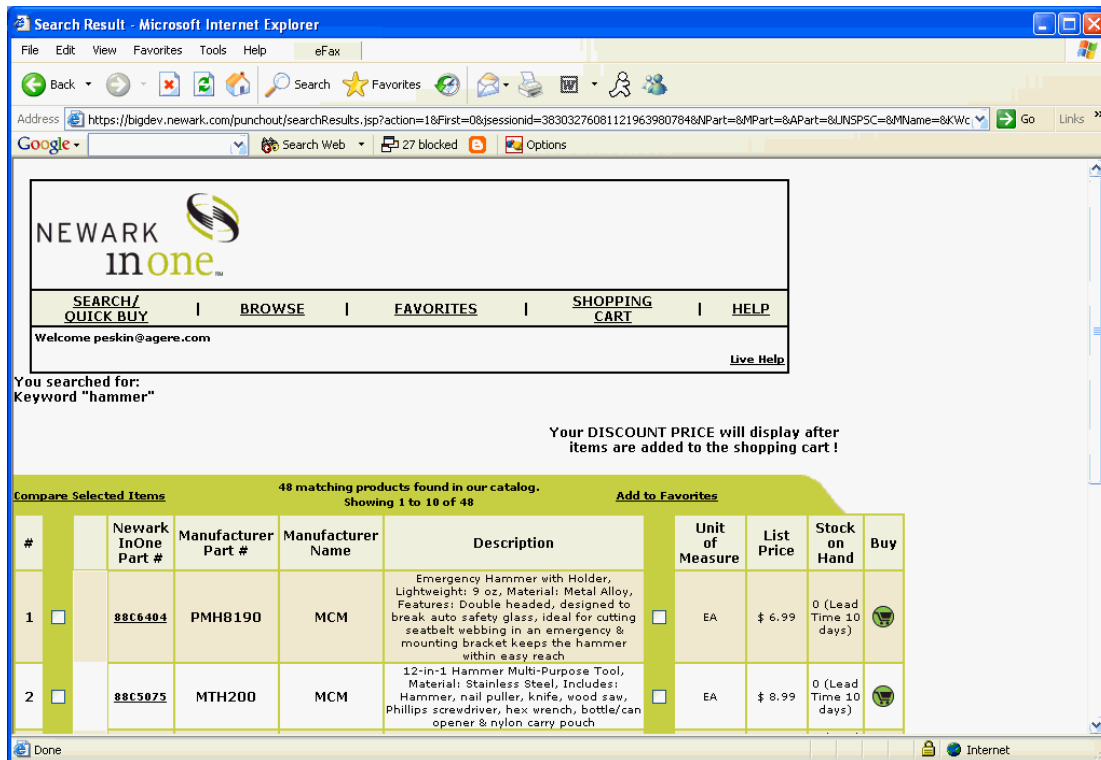


You will be re-routed to the supplier's website where you can search for items. Please note that each supplier's website is different and this demonstration will show how to order from one specific supplier, Newark InOne. Ordering from other suppliers will be different, but a similar process can be followed.



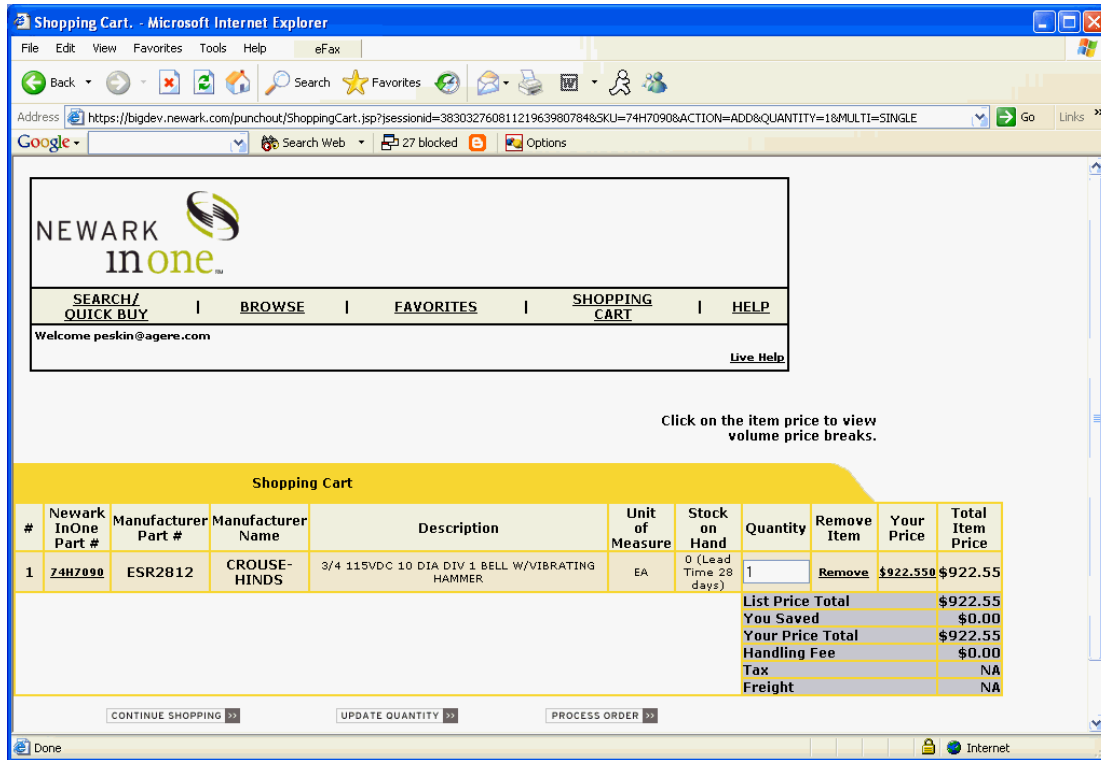


2. Search for the desired item or service desired.



3. Add the appropriate item or items to the supplier's shopping cart.

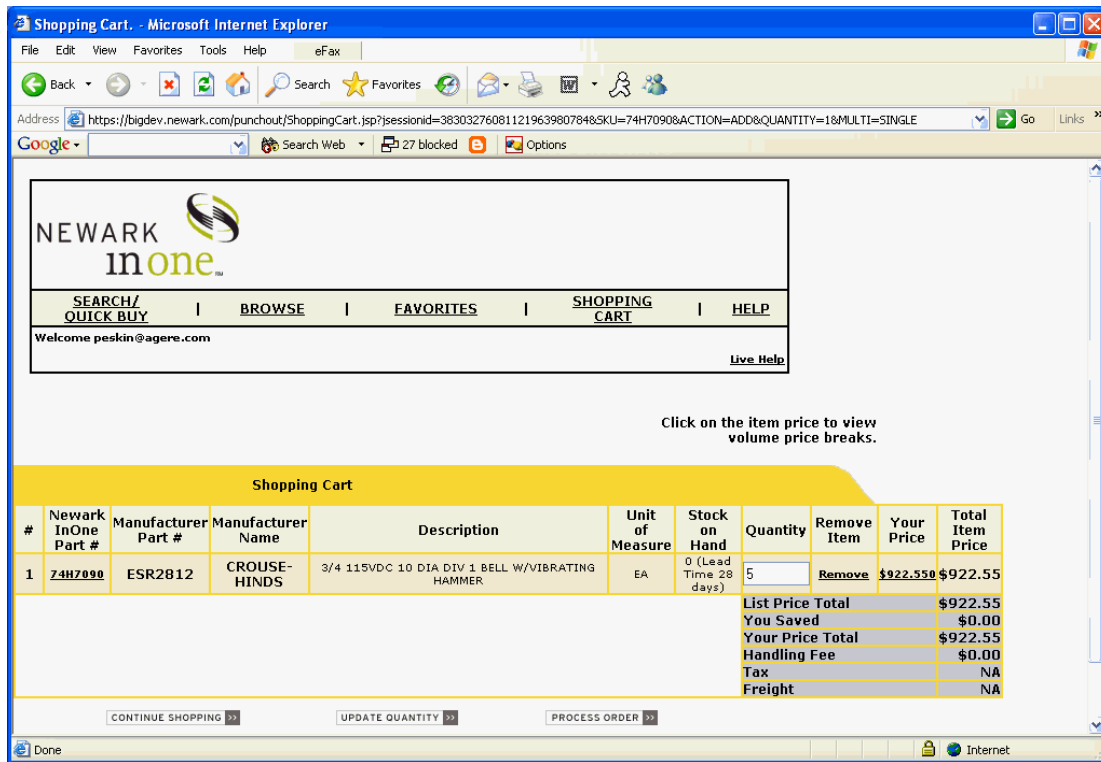
In this case, click the appropriate shopping cart icon in the Buy column.



4. Continue to search for additional items if desired.

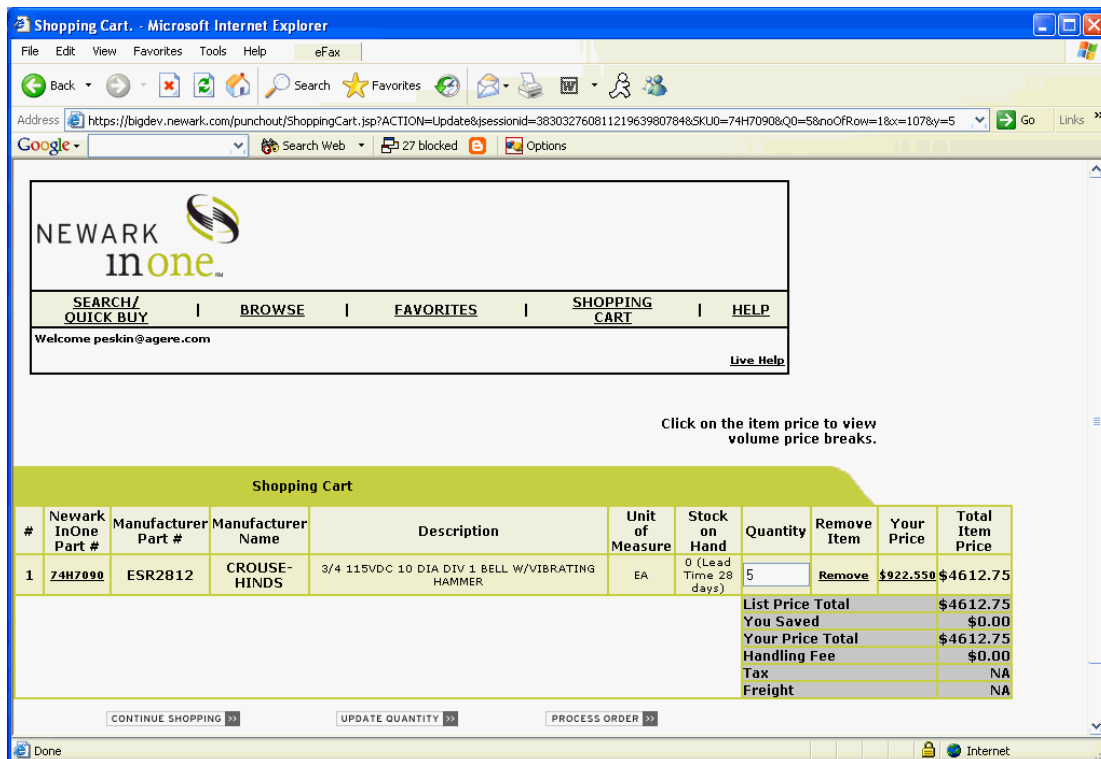
5. Update the quantity if desired.

Many supplier websites require you to click on a button to update the shopping cart with the new quantity.



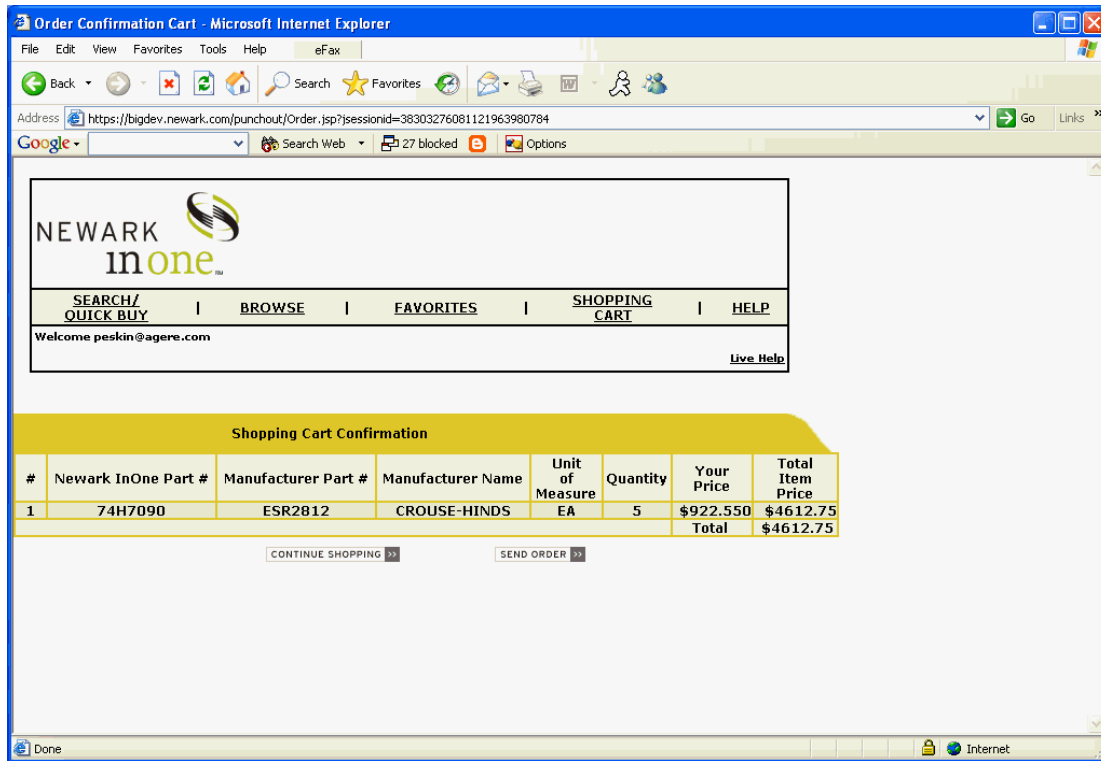
6. Click the appropriate button to update the quantity or shopping cart.

In this case, click (B) Update Quantity.



7. Checkout from the supplier site.

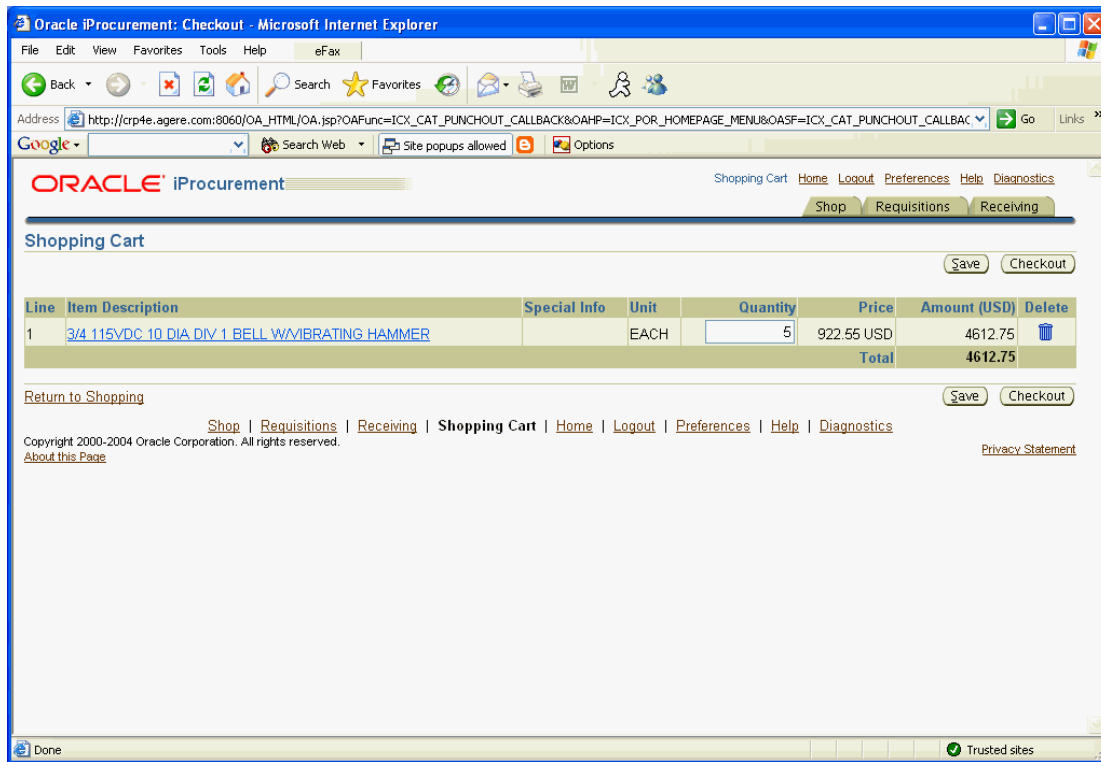
In this case, click (B) Process Order.



A summary screen is usually displayed as a confirmation.

8. Click the appropriate button to return to iProcurement.

In this case, click (B) Send Order.



The selected items will now be in your iProcurement shopping cart.

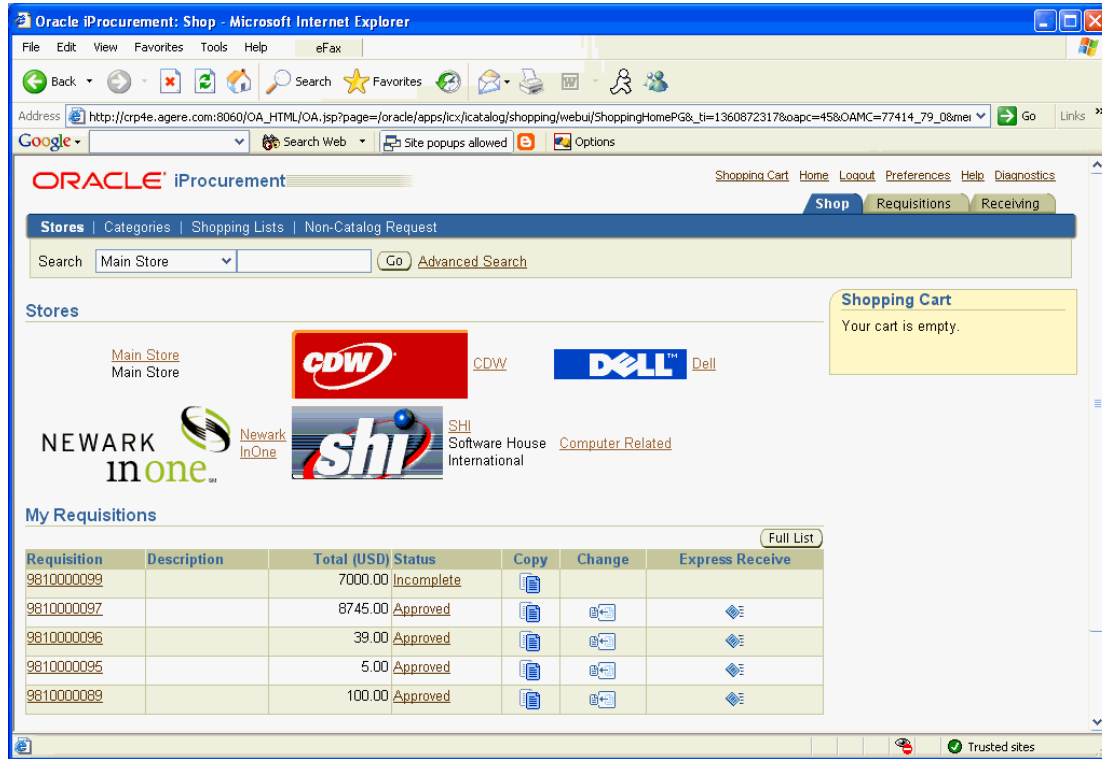
End of activity.

Shop Using an iProcurement Store

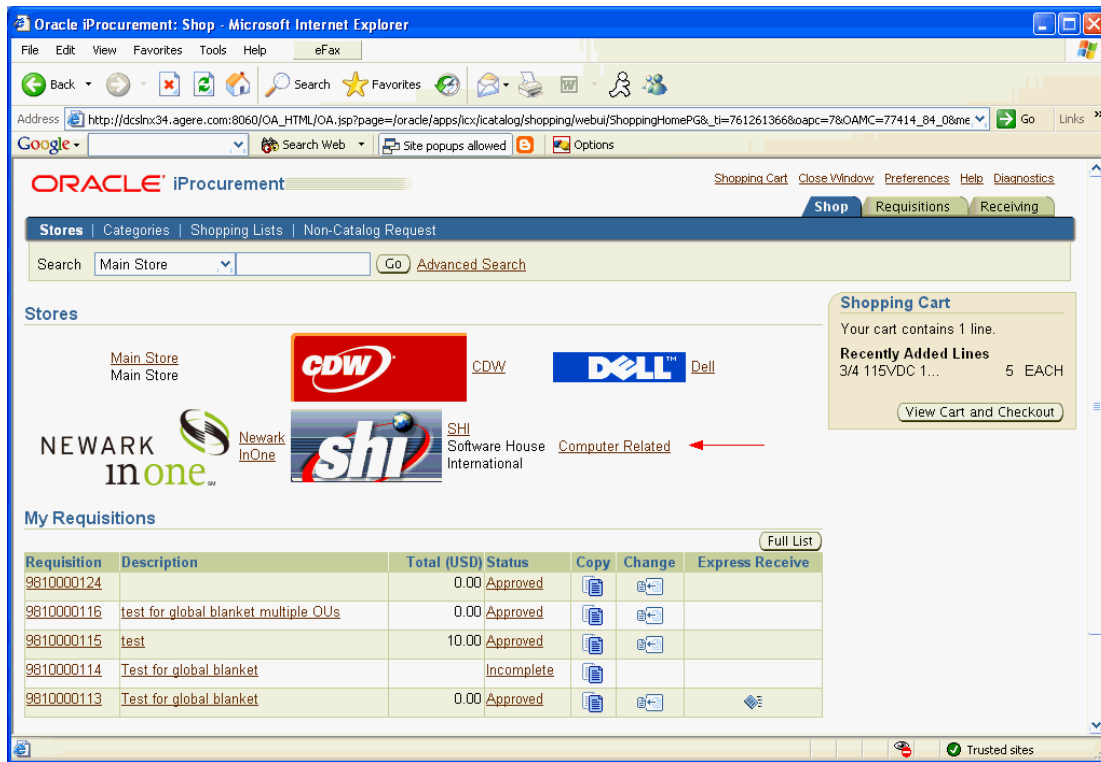
iProcurement

N > iProcurement > (ST) Shop > (ST) Stores

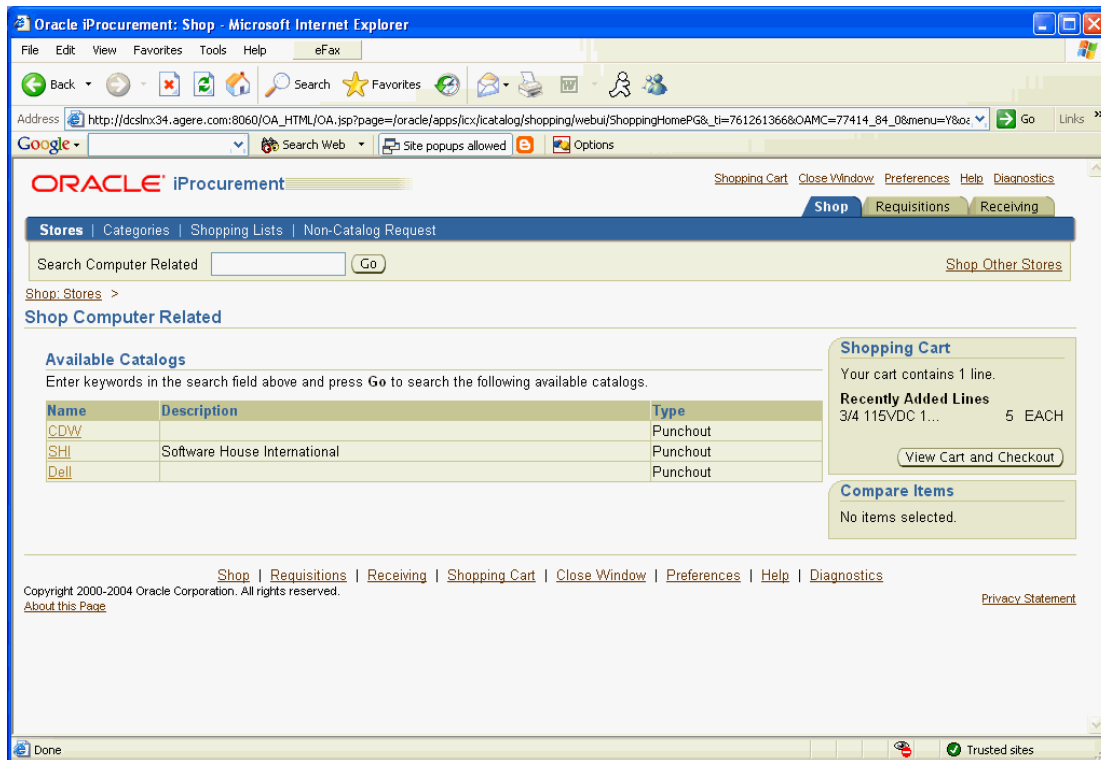
Shop: Stores



1. Click on the image or link for the appropriate store.



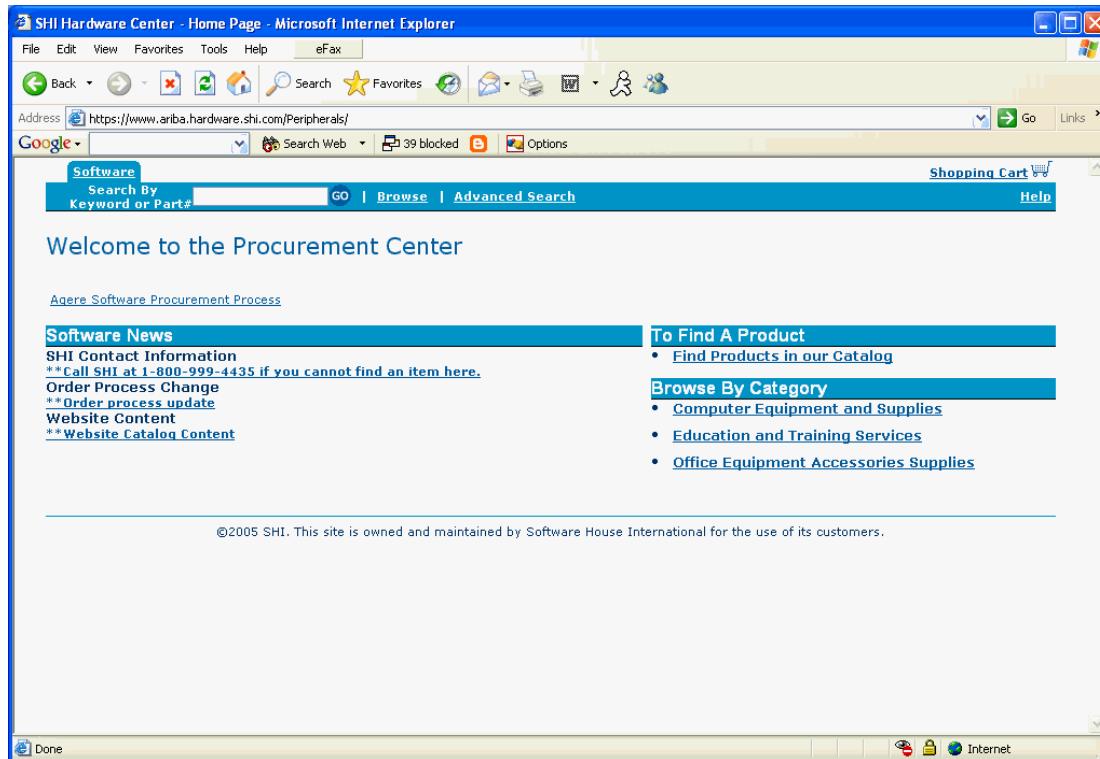
You will be taken to a screen showing you all of the catalogs contained in the store.



If an appropriate supplier can be found in the store, goto task #2. Otherwise, goto End of Activity.

2. Click on the link for one of the available catalogs.

This will take you either to a supplier Punchout site or an informational webpage.



For a punch-out catalog, you will be re-routed to the supplier's website where you can search for items.

Additional information: [Search a Supplier Website Using Punchout \[../FND/@NAP2P201\]](#)

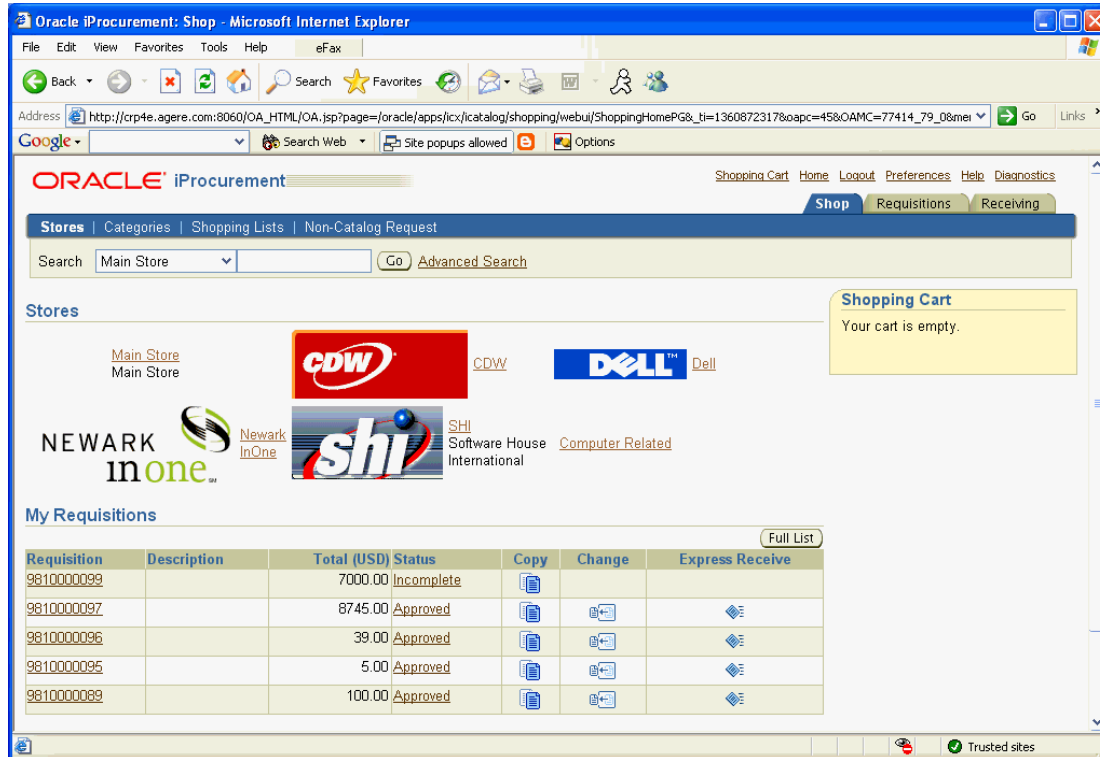
End of activity.

Searching for Items in iProcurement

iProcurement

N > iProcurement > (ST) Shop > (ST) Stores

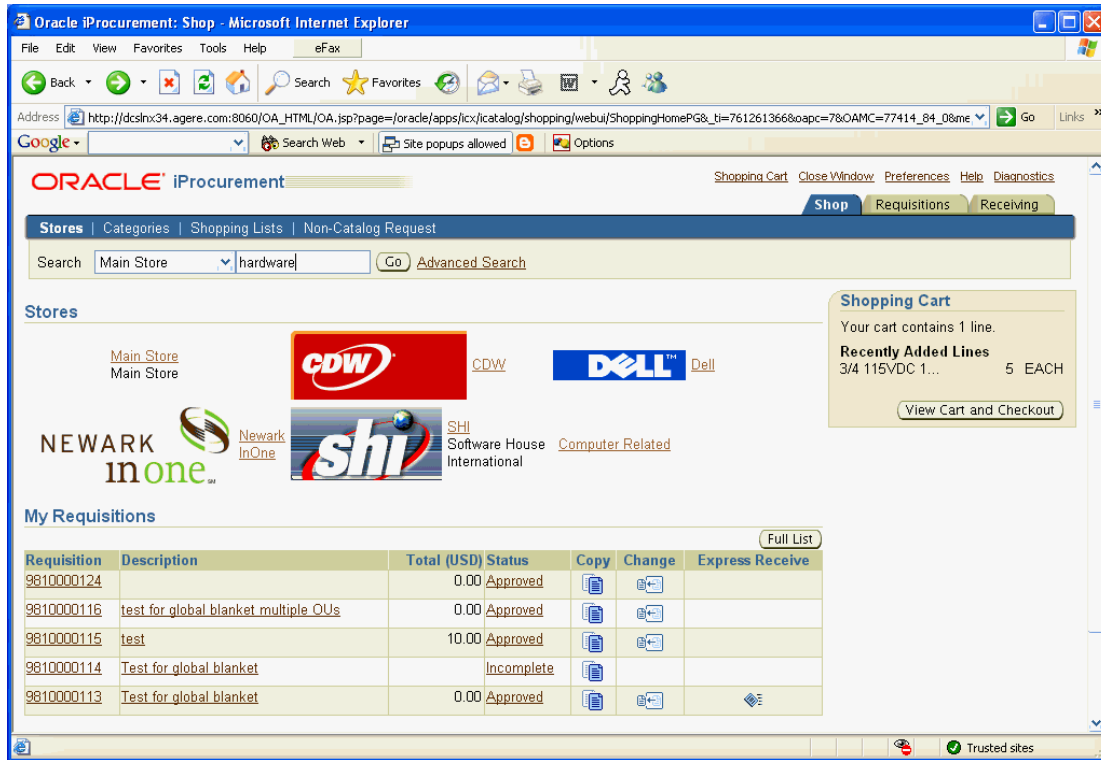
Stores



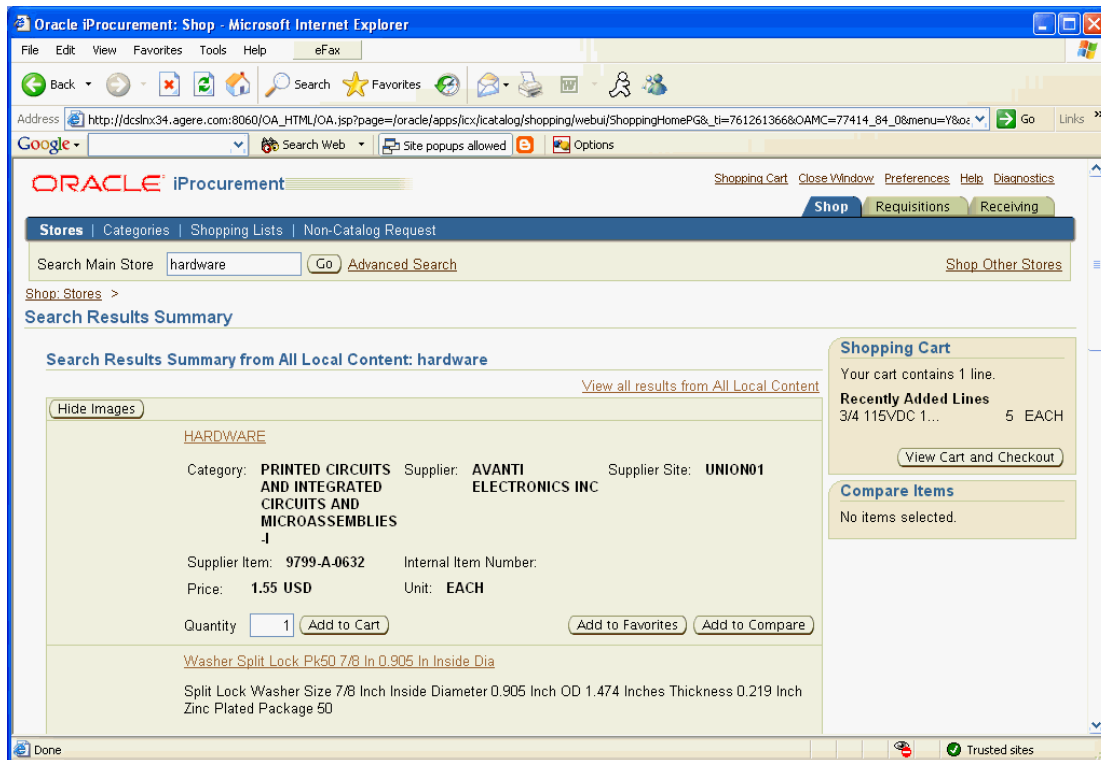
1. Specify the appropriate search criteria in the search field.

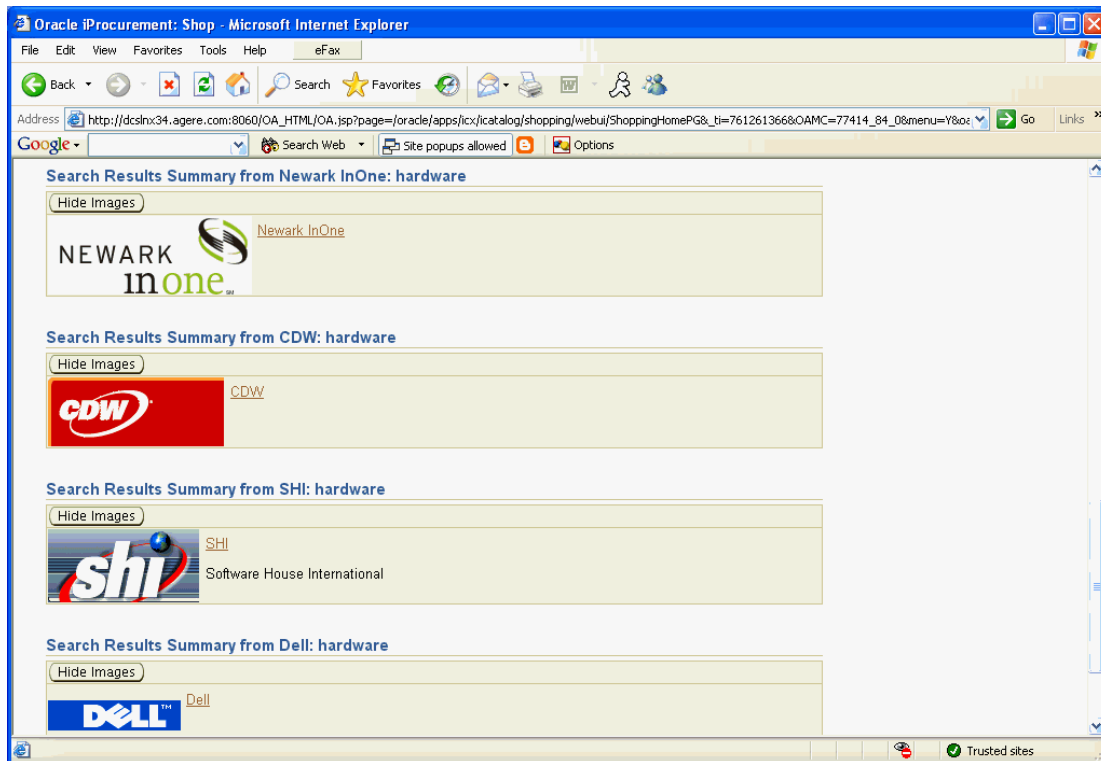
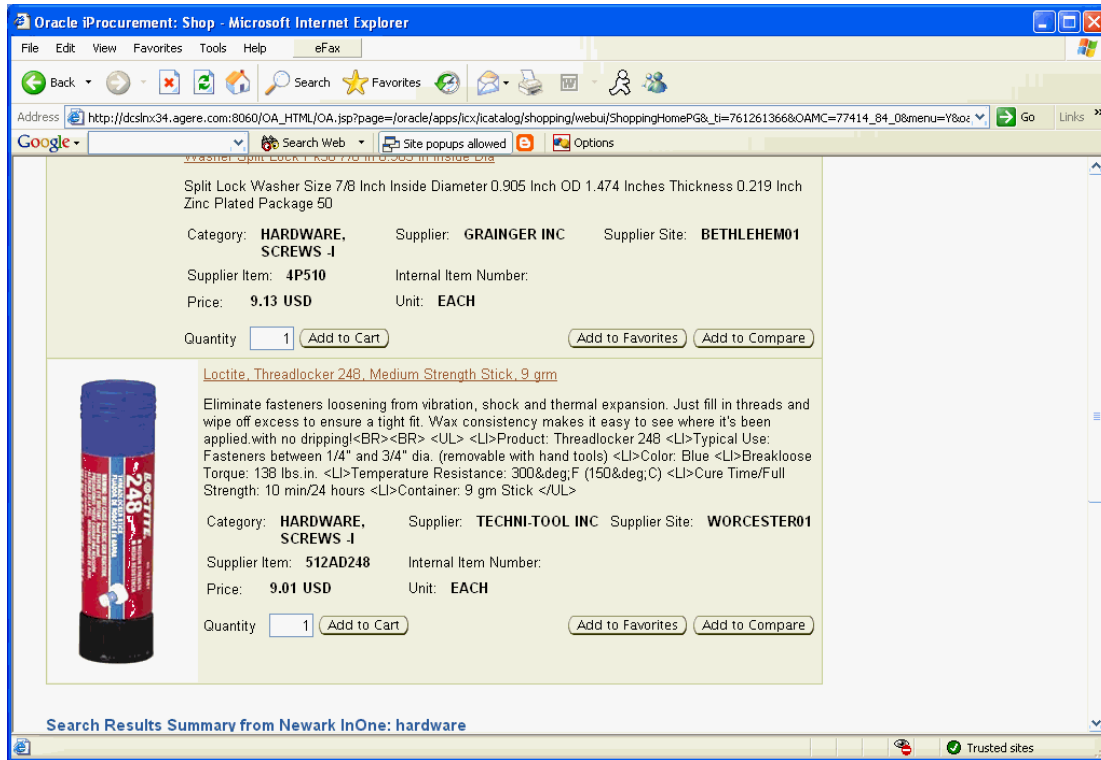
Oracle's wildcard character, '%', can be used in a search. The '%' character matches 0 or more characters. For example, searching for 'h%ware' will match 'hardware'.

When searching the iProcurement catalog, searches are word based and must match the entire word. For example, 'wir' will not match 'wired', but 'wir%' will match 'wired' or 'wires'.



2. Click (B) Go.



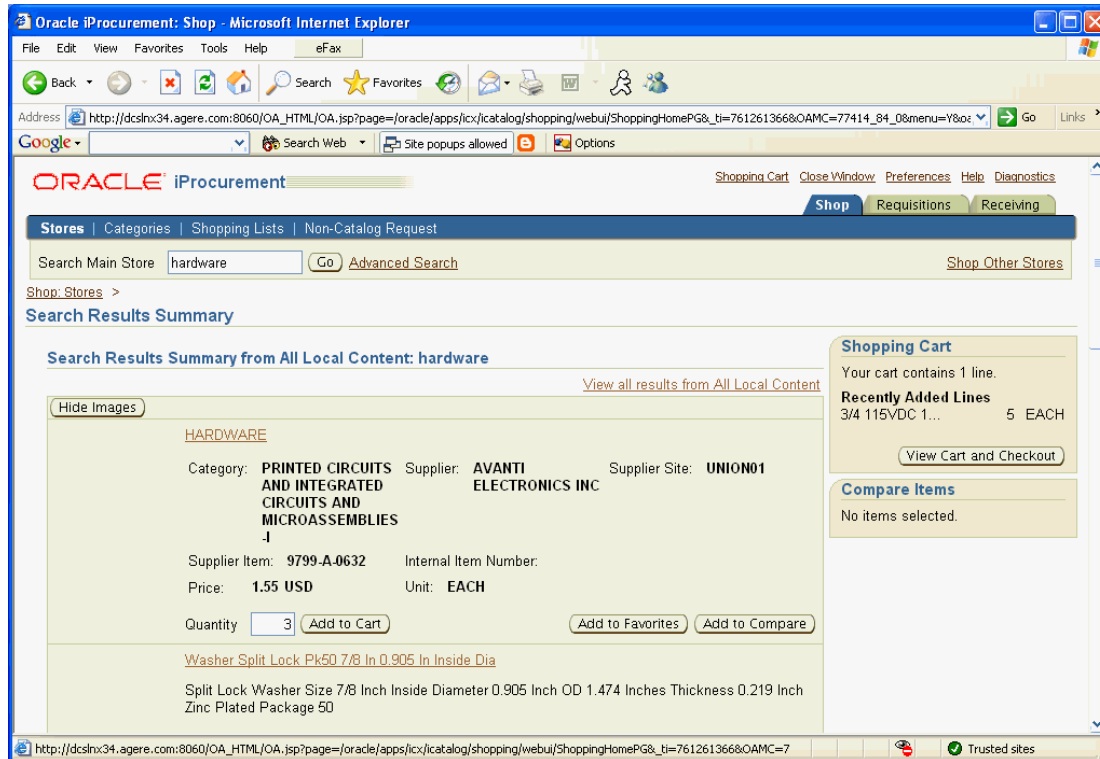


The system will return any items from Agere's internally loaded catalog that matches the search criteria. In addition, the system will display punch-out suppliers that may sell the item that you desire to purchase. iProcurement is not able to search each supplier's website,

but iProcurement will return suggested punch-out suppliers based on the categories of items that they sell.

If the desired item is displayed, goto task #3.

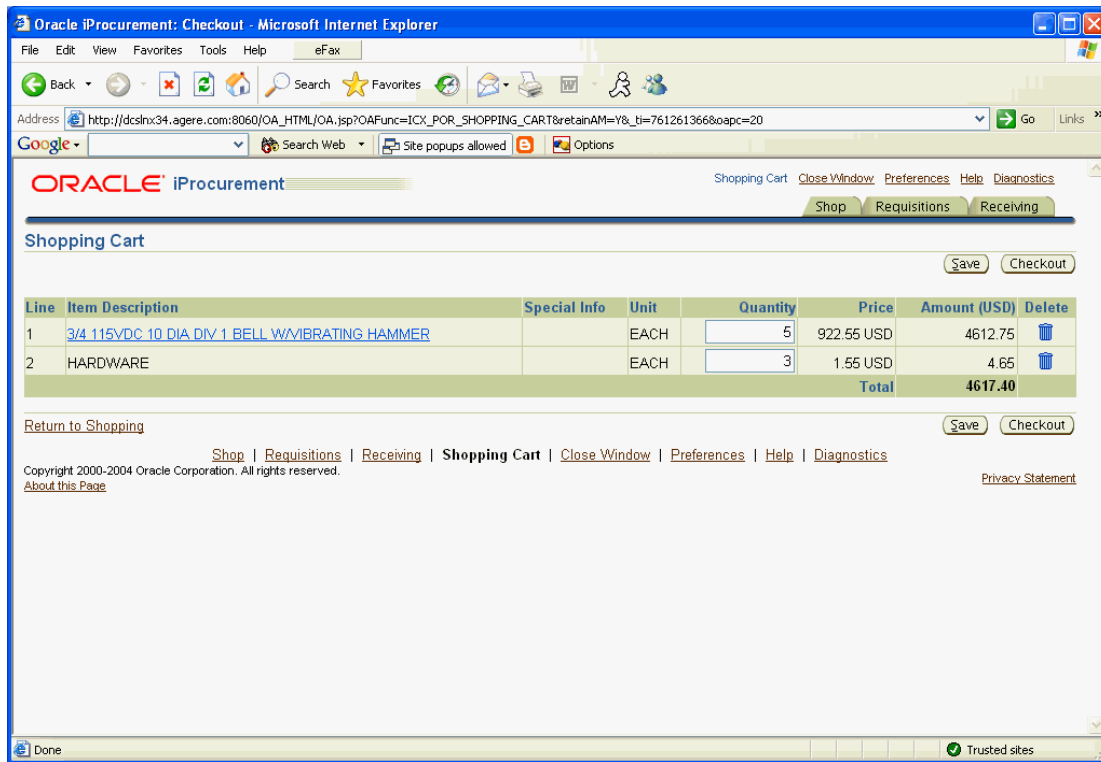
If a possible supplier is displayed, goto task #5. Otherwise, goto End of Activity.



3. Specify the appropriate quantity and click (B) Add to Cart.

If additional items are desired, goto task #1. Otherwise, goto task #4.

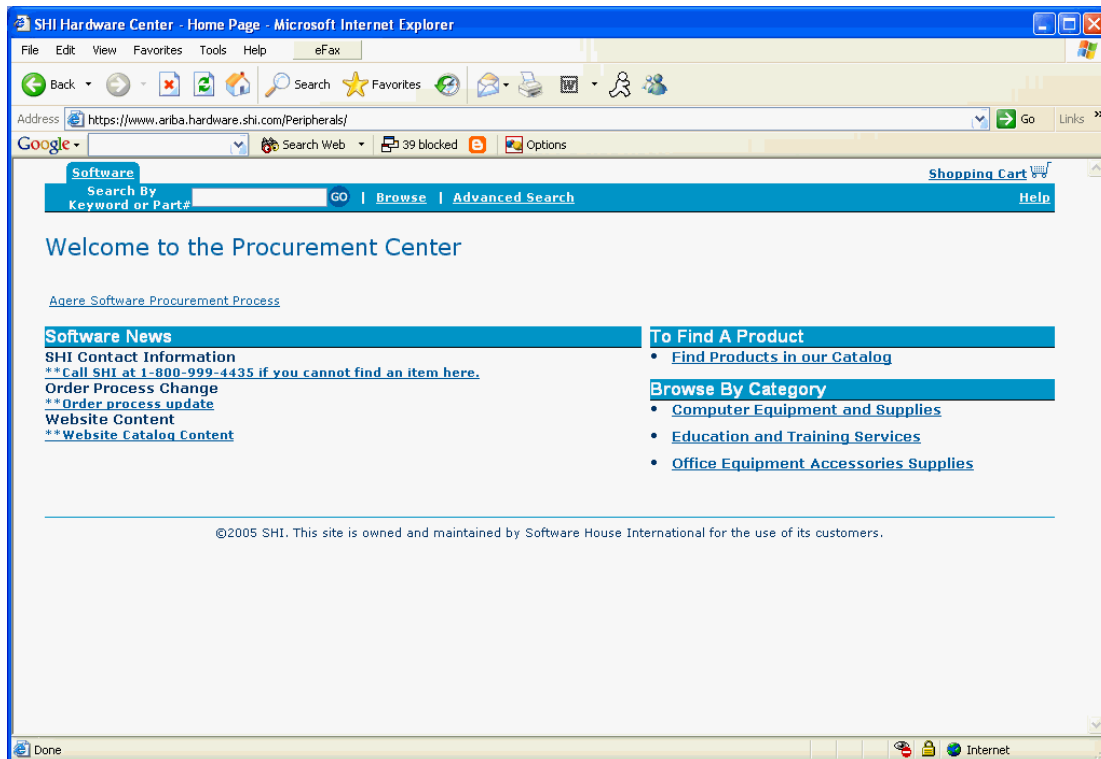
4. Click (B) View Cart and Checkout.



End of activity.

5. Click on the link for one of the available catalogs.

This will take you either to a supplier Punchout site or an informational webpage.



For a punchout catalog, you will be re-routed to the supplier's website where you can search for items.

Additional information: *Search a Supplier Website Using Punchout [../FND/@NAP2P201]*

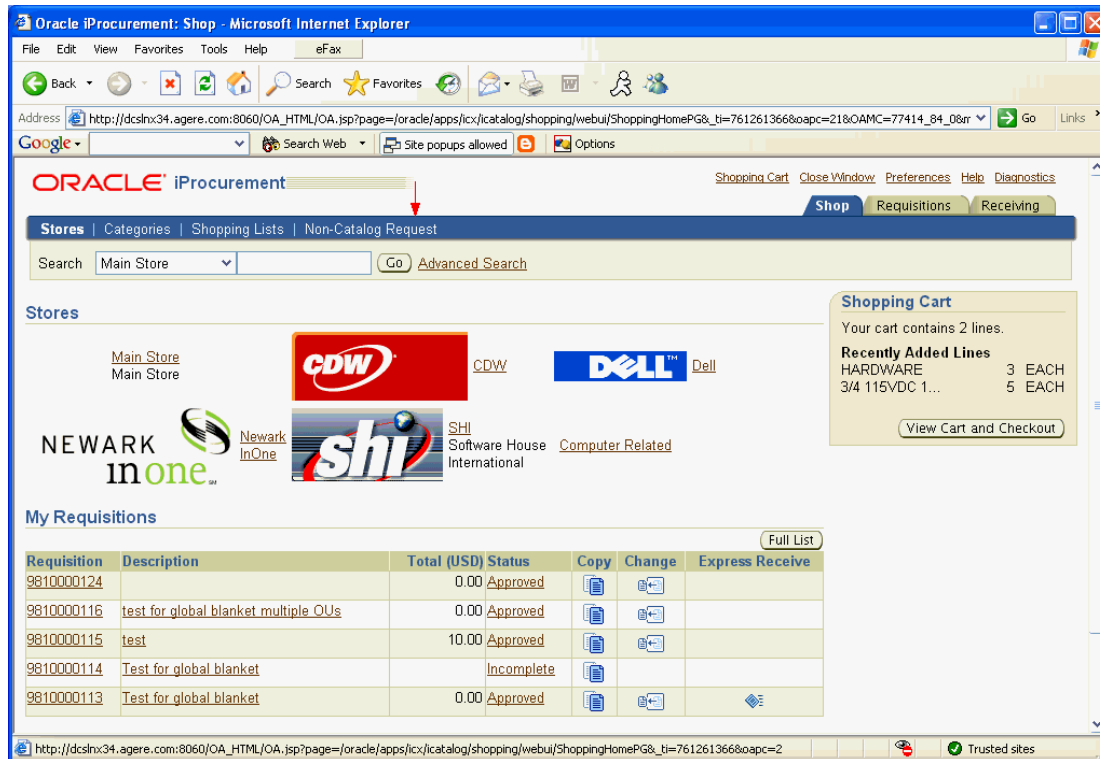
End of activity.

Create a Non-Catalog Requisition Line in iProcurement

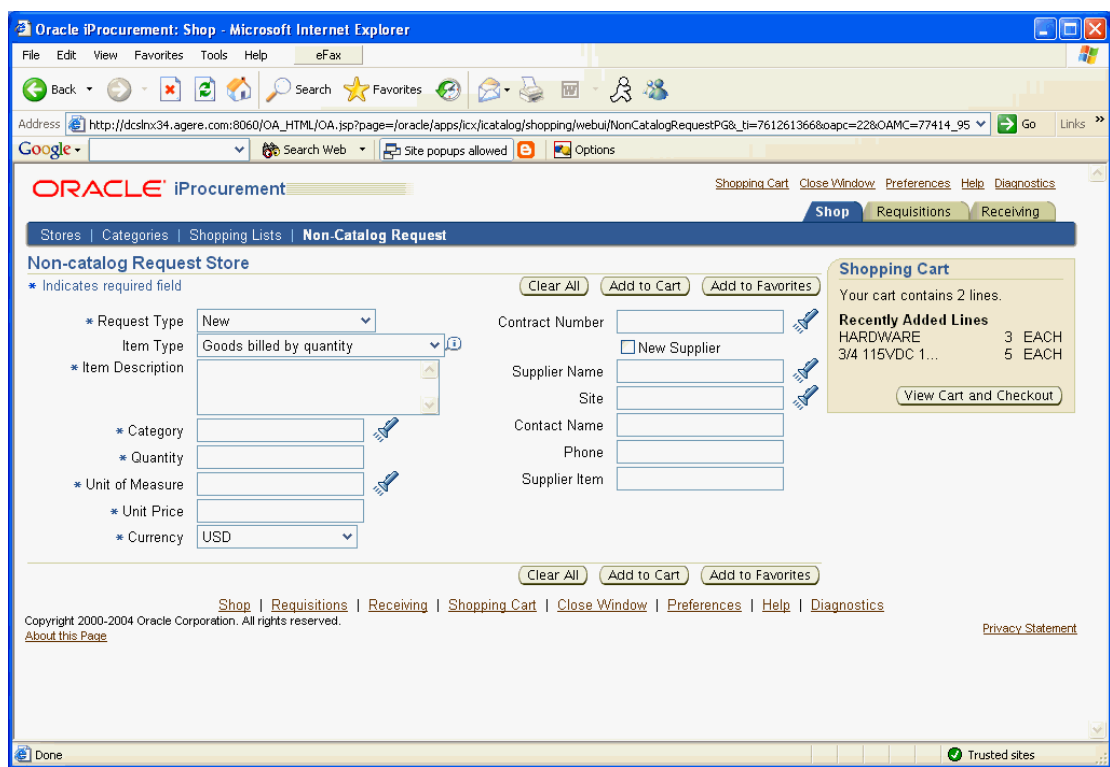
iProcurement

N > iProcurement > (ST) Shop > (ST) Non-Catalog Request

Non-catalog Request Store



1. Click (ST) Non-Catalog Request.



2. Select an appropriate Request Type or New if none of the request types are appropriate.

The request type selected will determine the fields that are available on this screen.

3. Specify the Item Type.

Goods billed by quantity - this is used anytime that you are ordering a product that can be specified in terms of a quantity and a price.

Goods or services billed by amount - this is used when a flat currency amount needs to be specified. This item type IS NOT recommended if you are requesting an RFQ.

Services billed by quantity - this is used when ordering a service that can be expressed in terms of a quantity and price such as 100 hours at 50 dollars per hour.

The item type selected will determine the fields that are available on this screen.

4. Enter an appropriate item description.

This needs to be descriptive enough that the buyer and supplier will understand what you would like to order.

5. Select an appropriate category.

6. Enter the quantity or amount.

7. Specify a unit of measure.

8. Enter the Price or Rate per Unit.

If this is a request for an RFQ, then the price should be specified as 0.

9. Select the appropriate Currency.

10. Enter the contract and supplier information if you know the appropriate values.

11. Enter a Supplier Item Number if known.

The screenshot displays the Oracle iProcurement 'Non-Catalog Request Store' interface. The page title is 'Non-catalog Request Store'. The main content area contains a form for adding a new item to a shopping cart. The form includes the following fields and values:

- Request Type: New
- Item Type: Services billed by quantity
- Item Description: Java consultant with J2EE experience
- Category: 43-16-00-00.00.1
- Quantity: 100
- Unit of Measure: HOUR
- Rate per Unit: 50
- Currency: USD
- Contract Number: (empty)
- Supplier Name: JJM_SUPPLIER
- Site: SITE_01
- Contact Name: McCarthy, John
- Supplier Item: (empty)

Buttons for 'Clear All', 'Add to Cart', and 'Add to Favorites' are present above and below the form. A 'Shopping Cart' summary on the right indicates 'Your cart contains 2 lines.' and lists 'Recently Added Lines':

Item Description	Quantity	Unit
HARDWARE	3	EACH
3/4 115VDC 1...	5	EACH

A 'View Cart and Checkout' button is located below the cart summary. The page footer includes copyright information: 'Copyright 2000-2004 Oracle Corporation. All rights reserved.' and a 'Privacy Statement' link.

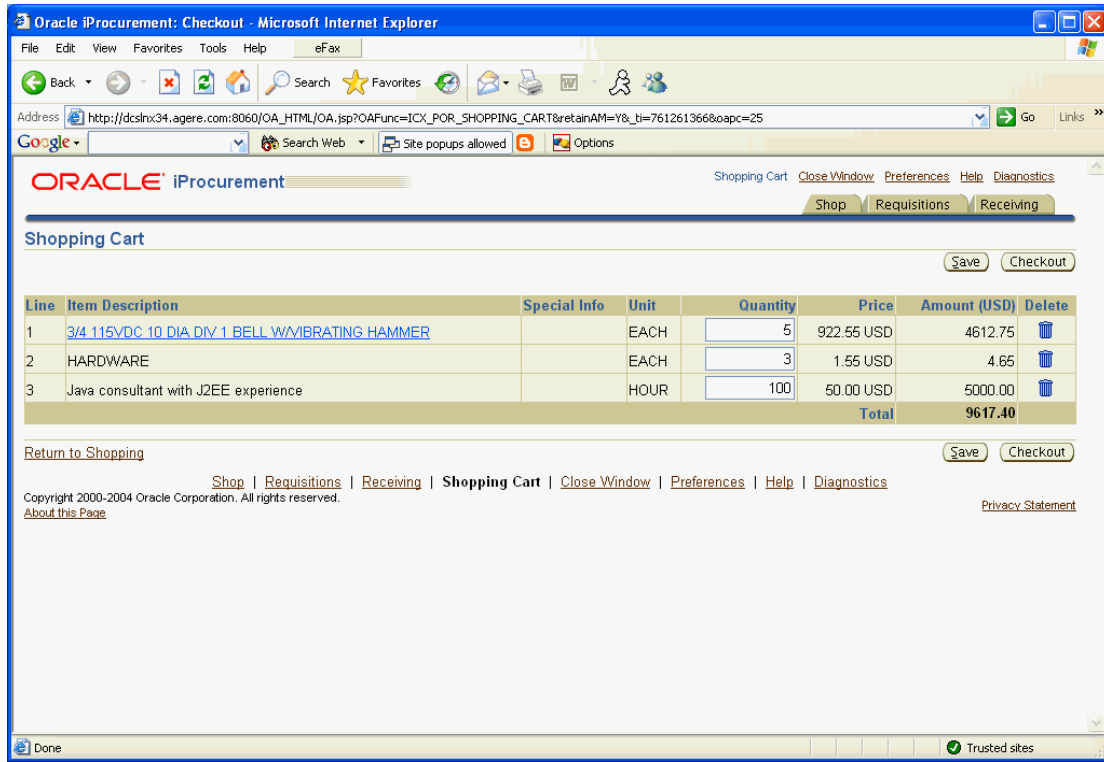
12. Click (B) Add to Cart.

If additional items are desired, goto task #13. Otherwise, goto task #14.

13. Click (B) Clear All.

Goto task #2

14. Click (B) View Cart and Checkout.



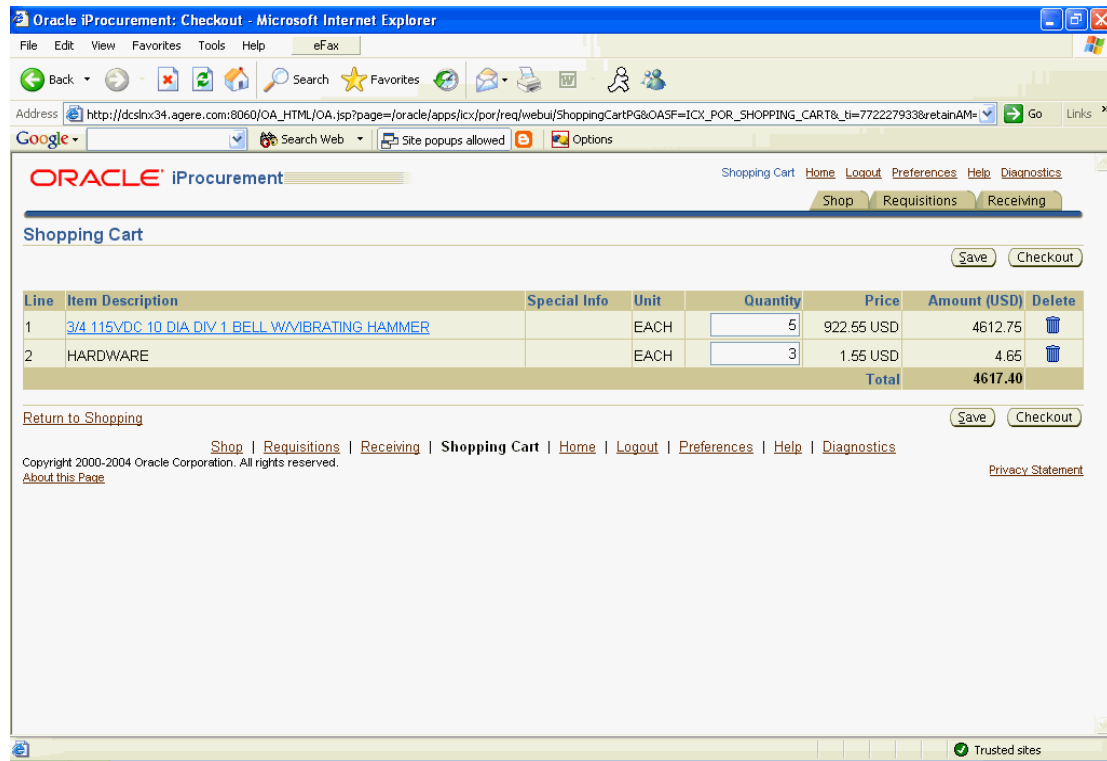
End of activity.

Checkout and Complete an iProcurement Requisition

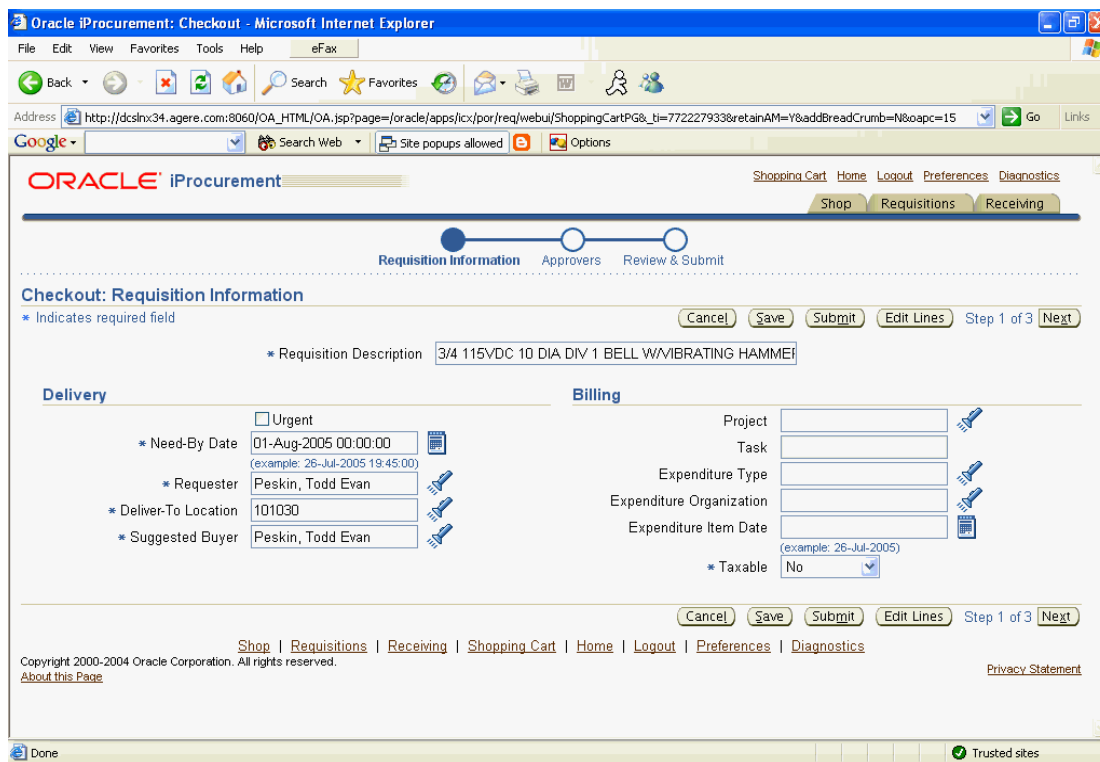
iProcurement

N > iProcurement > (ST) Shop

Shopping Cart



1. Update the Quantity if desired.
2. Click (B) Checkout.



3. Enter an appropriate description for the requisition.

The description will automatically default from the first requisition line, but you may want to change it to something more useful.

4. Update the Need-By Date appropriately.

This date will automatically populate based on your iProcurement preferences.

5. Update the Requester or Deliver-to Location fields if necessary.

These fields will default automatically based on the user that is creating the requisition.

If this order is being placed on behalf of another employee, then update these fields appropriately.

6. Specify the Suggested Buyer if it was not already populated by the system.

This is a mandatory field and the information must be specified for each requisition line.

If the word Multiple is displayed for this field, then click on the Multiple link and verify that a Suggested Buyer has been specified for each requisition line.

Do not change any Suggested Buyers that are automatically populated by the system.

7. Enter the appropriate Project Billing information if this requisition will be billed to a project.

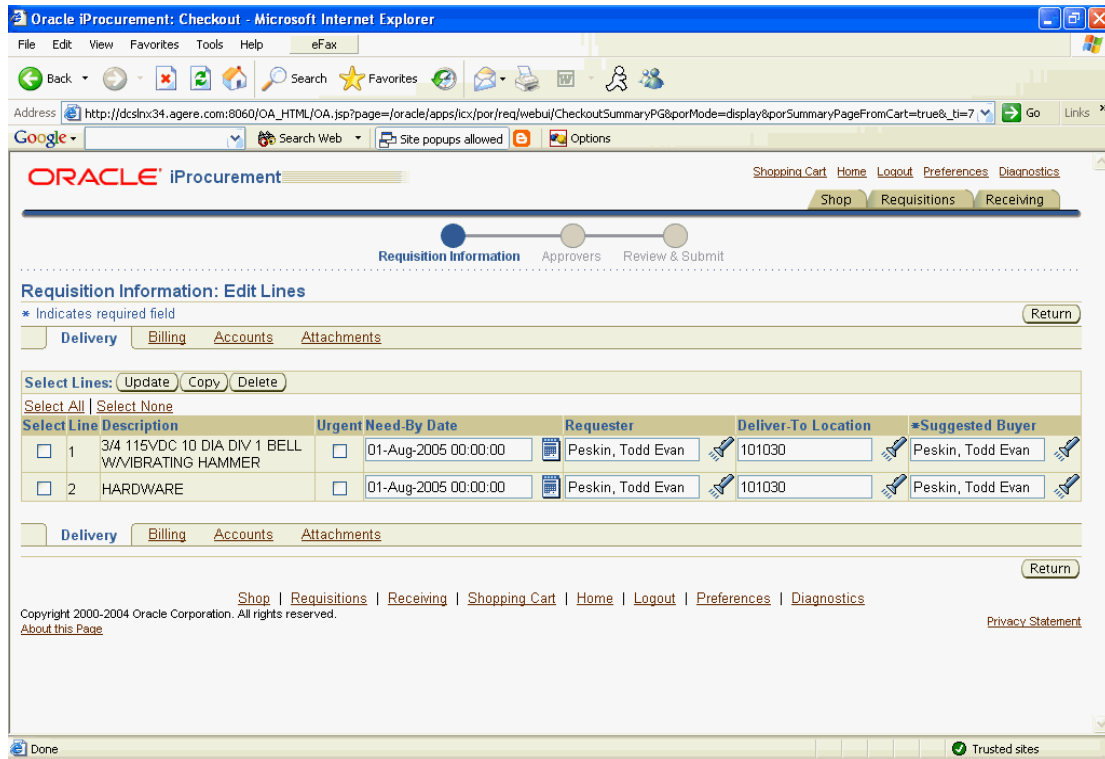
The Taxable information will automatically default by the system and should not be modified.

The Charge Account will automatically default on all requisition lines based on your default charge account on your employee record, unless you have already set an alternative primary account through Preferences.

Additional information: [Setting iProcurement Preferences \[../FND/@NAP2P200\]](#)

If any of these details differ for any of the requisition lines, goto task #8. Otherwise, goto task #40.

8. Click (B) Edit Lines.



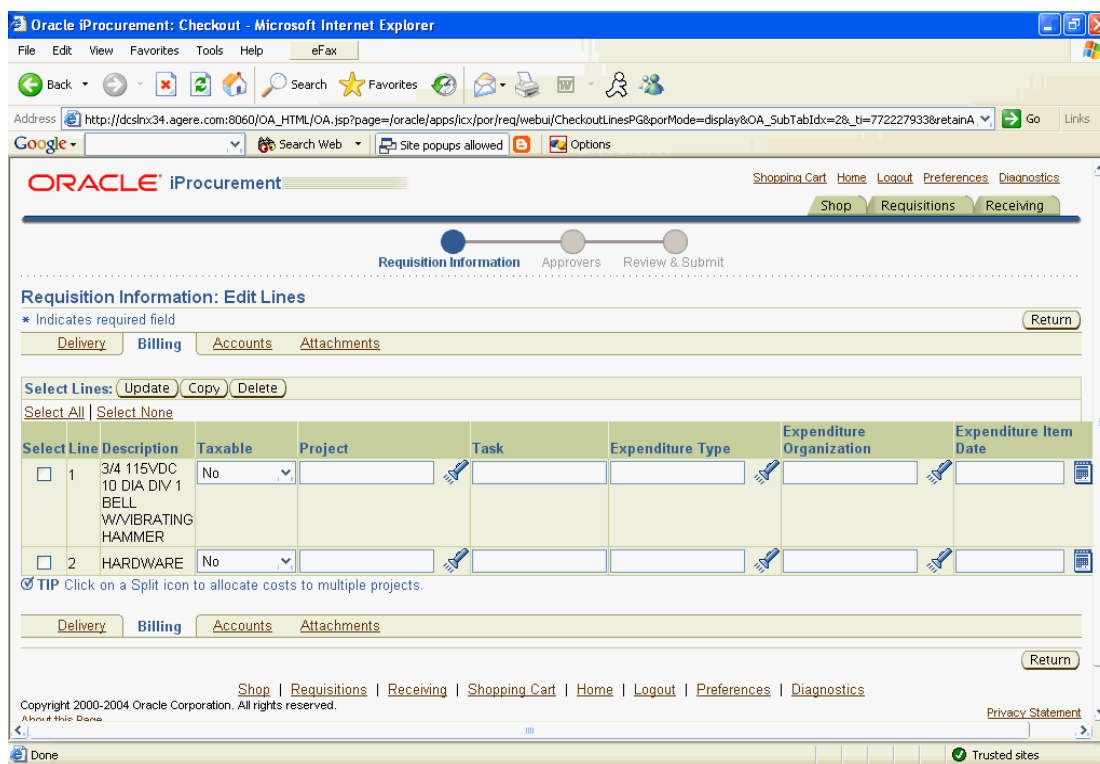
9. Update any of the fields in the Delivery section as desired.

10. Verify that the Suggested Buyer has been populated for each requisition lines.

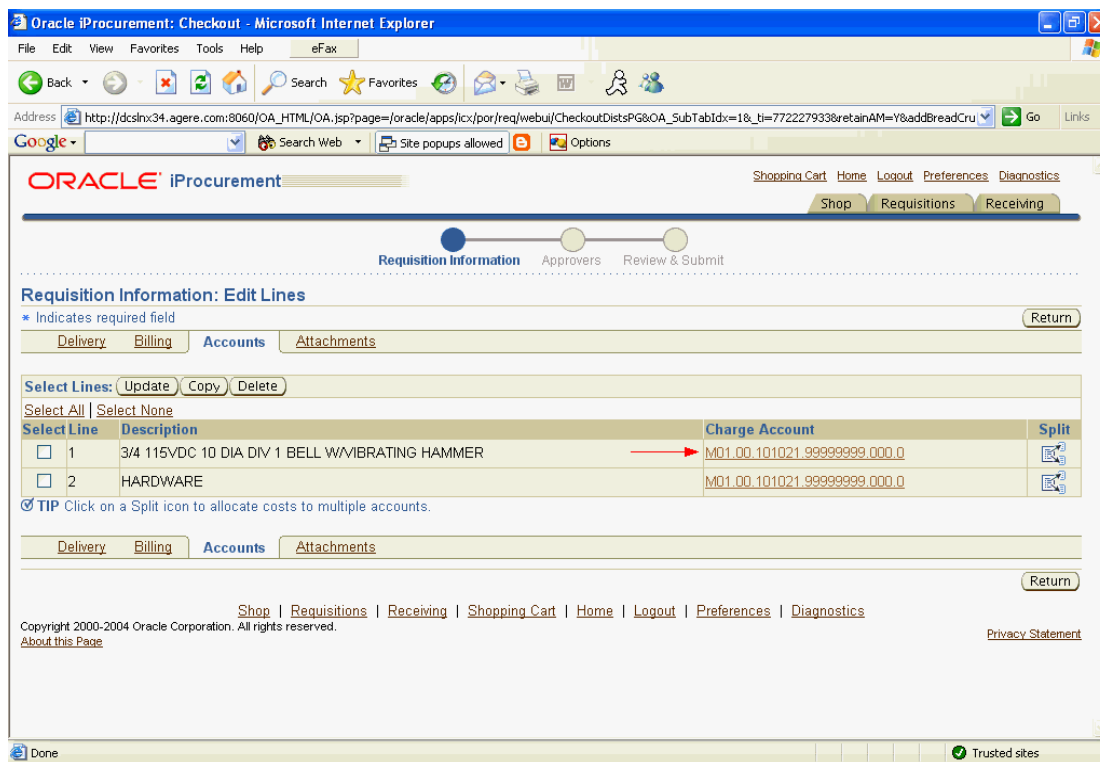
Catalog and punchout lines will normally pre-populate with the correct Suggested Buyer.

Non-catalog lines need to be populated with the correct buyer.

11. Click (ST) Billing to update Project Billing related information.

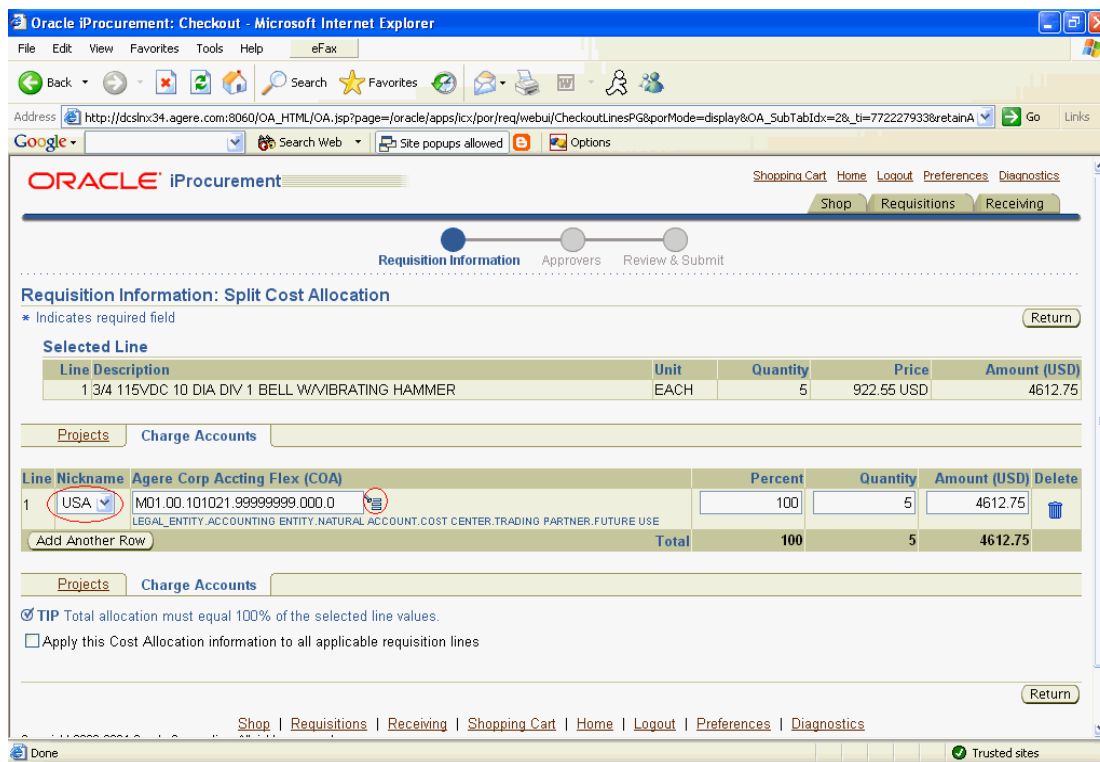


12. Click (ST) Accounts to update the charge account information.



If the charge account needs to be modified, goto task #13. Otherwise, goto task #23.

13. Click on the Charge Account link for the appropriate line.



If using a nickname, goto task #14. Otherwise, goto task #15.

14. Select an appropriate Nickname.

Goto task #20

15. Click the flashlight icon to search for a charge account.

Search and Select List of Values - Microsoft Internet Explorer

Search and Select: Agere Corp Accting Flex (COA) Cancel Select

Search

* LEGAL_ENTITY AGERE SYSTEMS INC. (US)

* ACCOUNTING ENTITY Micro Default IC & Opto

* NATURAL ACCOUNT Bank - Outstanding Checks

* COST CENTER Default

* TRADING PARTNER DEFAULT

* FUTURE USE DEFAULT

Search Create

Results

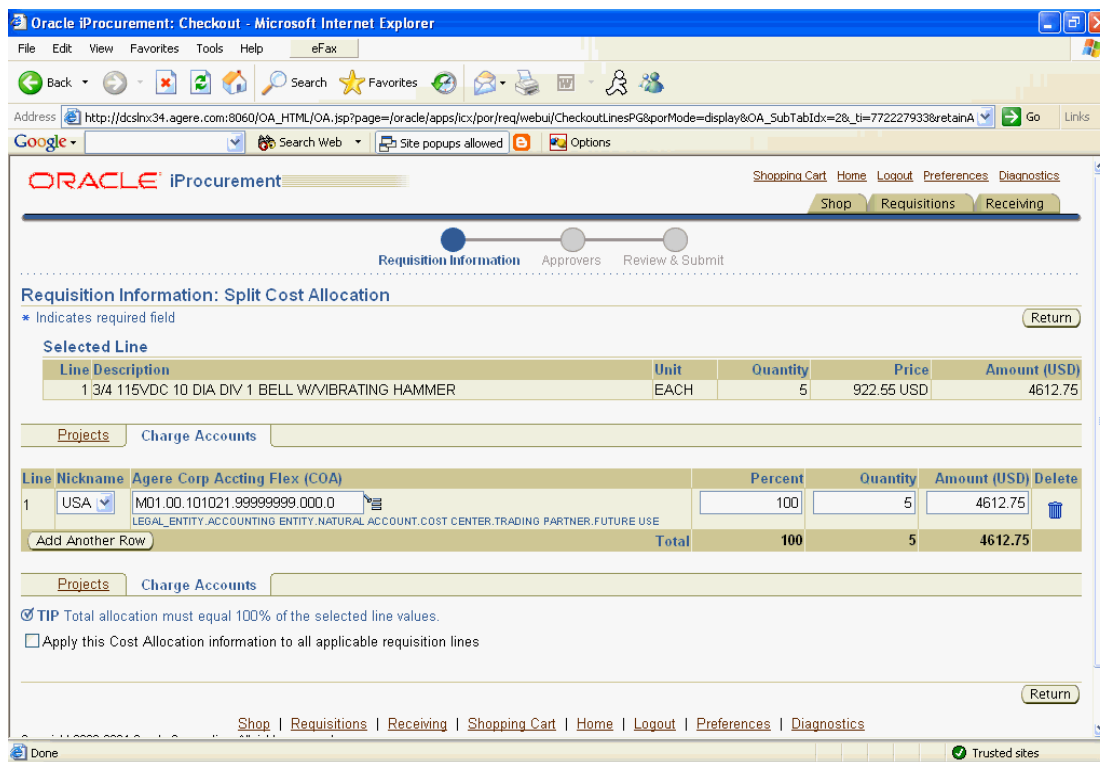
Select CodeCombination

<input type="radio"/>	MD1.00.101021.99999999.000.0
-----------------------	------------------------------

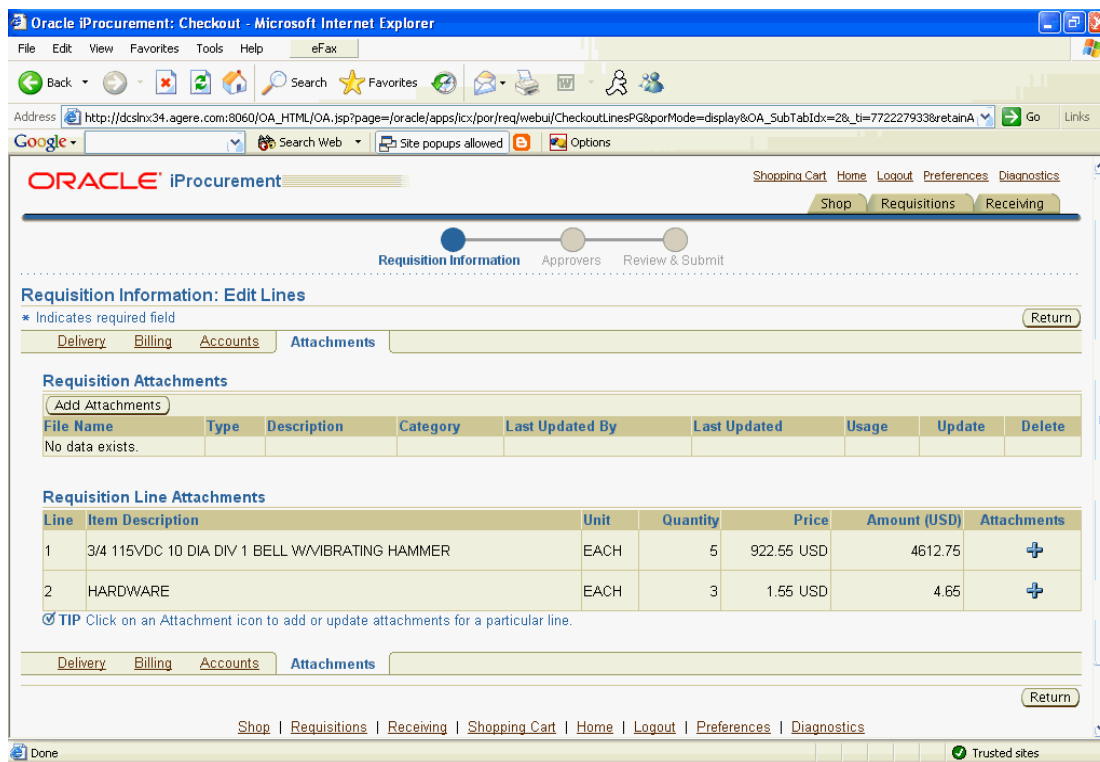
Cancel Select

Done Trusted sites

16. Enter the appropriate values for each account segment or use the flashlight to search for a value.
17. Click (B) Search to find all of the charge accounts that meet the search criteria.
18. Select an appropriate account.
19. Click (B) Select.

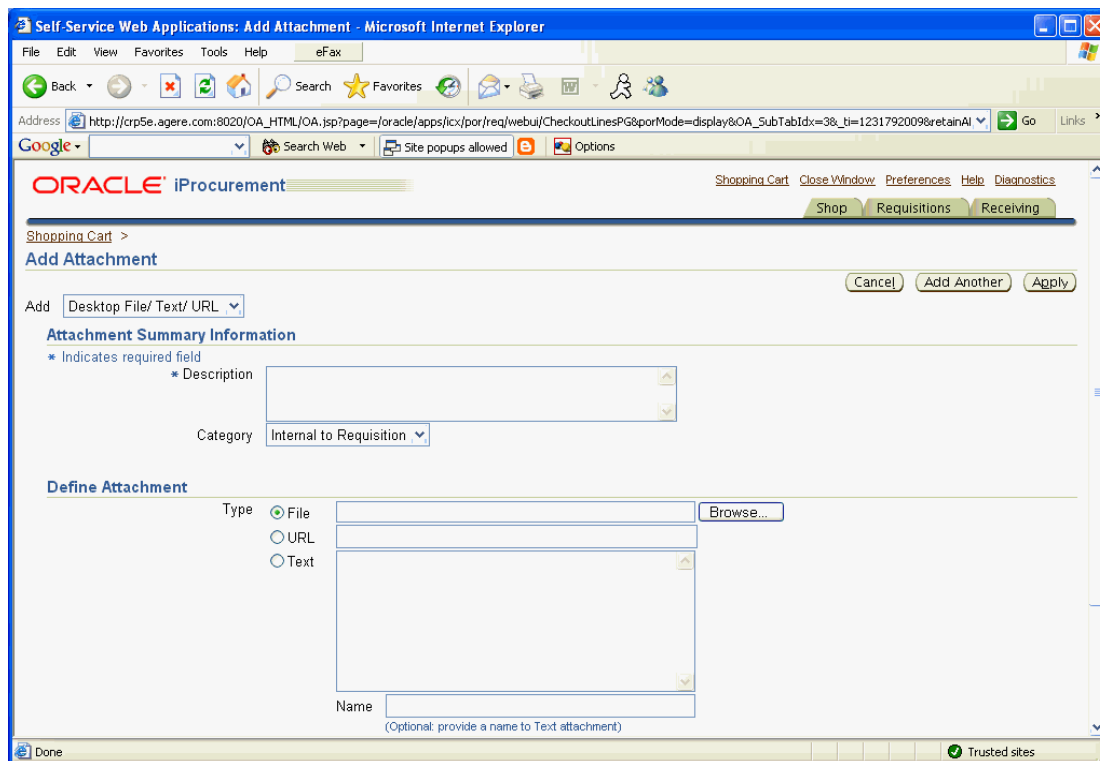


20. Add additional rows, if desired, using (B) Add Another Row.
21. Select the appropriate checkbox if you would like to Apply this Cost Allocation information to all applicable requisition lines.
22. Click (B) Return.
23. Click (ST) Attachment to add any desired requisition line attachments.



24. Click (I) + to add additional attachments if desired.

If adding an attachment, goto task #25. Otherwise, goto task #38.



25. Enter a description for the attachment.

26. Specify the Category.

- Select "To Supplier" if the supplier should be able to view the attachment.

If adding a file attachment, goto task #27.

If adding a URL (web link) attachment, goto task #31.

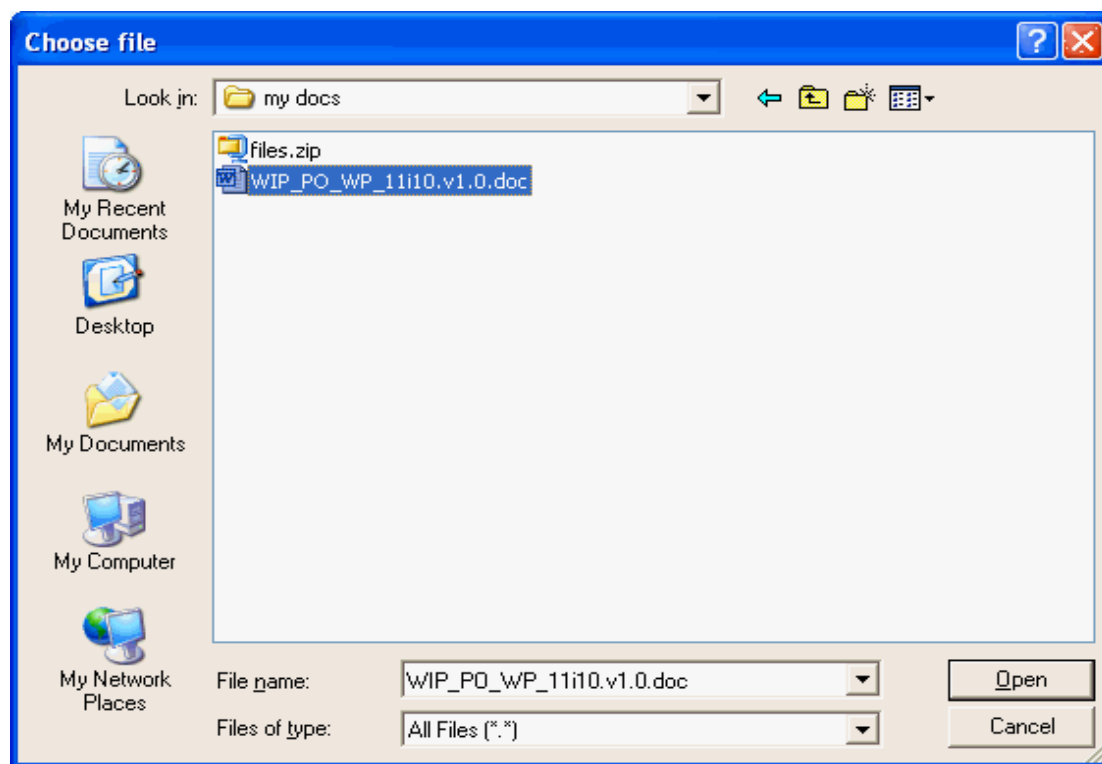
If entering a text attachment, goto task #34.

27. Click on the File radio button.

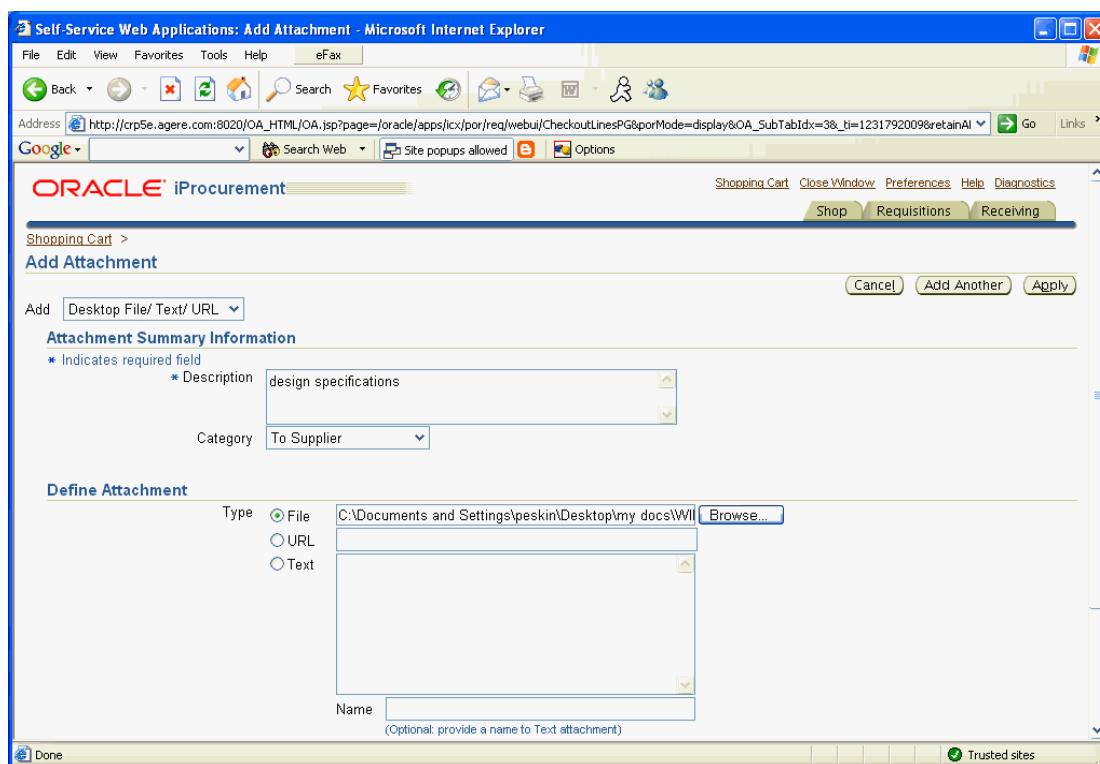
File attachments will not print on the purchase order. The supplier will, however, see a note stating that a file attachment exists for the purchase order line.

The supplier will be able to download the file using iSupplier, but they can only view the file if they have the appropriate program (i.e. Microsoft Excel for a spreadsheet).

28. Click (B) Browse.



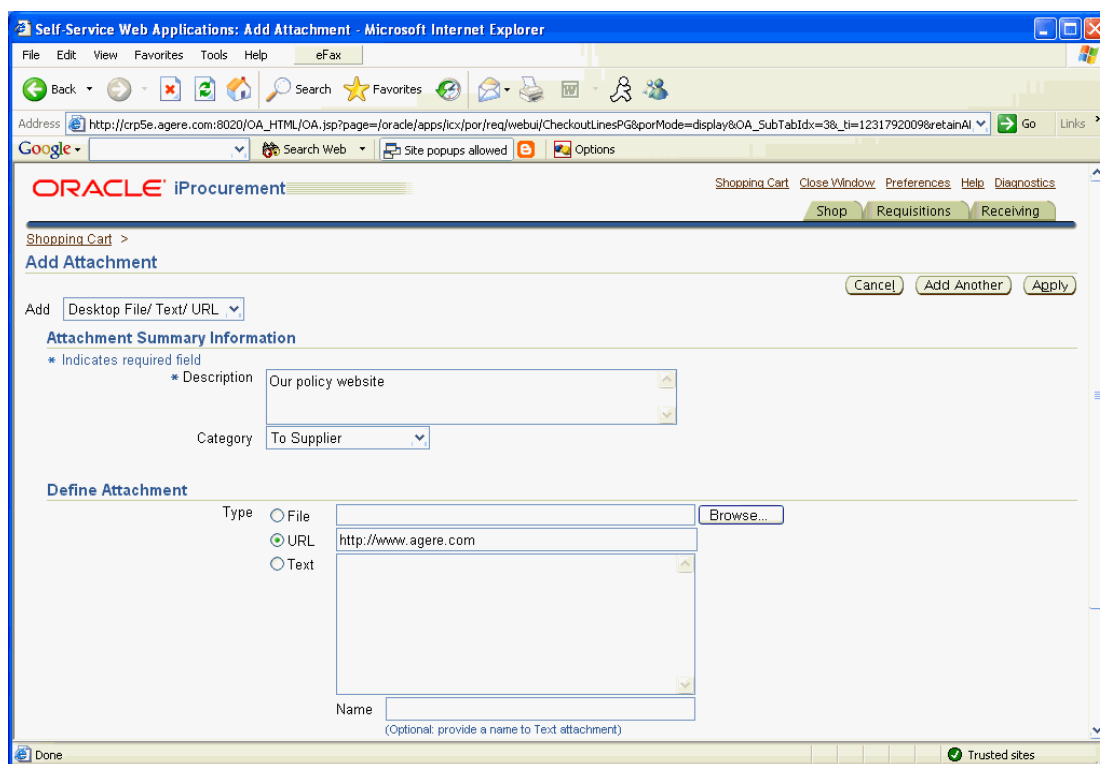
29. Select the appropriate file.



30. Click (B) Apply.

Goto task #38

31. Click on the URL radio button.
32. Enter the URL for the web page.



33. Click (B) Apply.

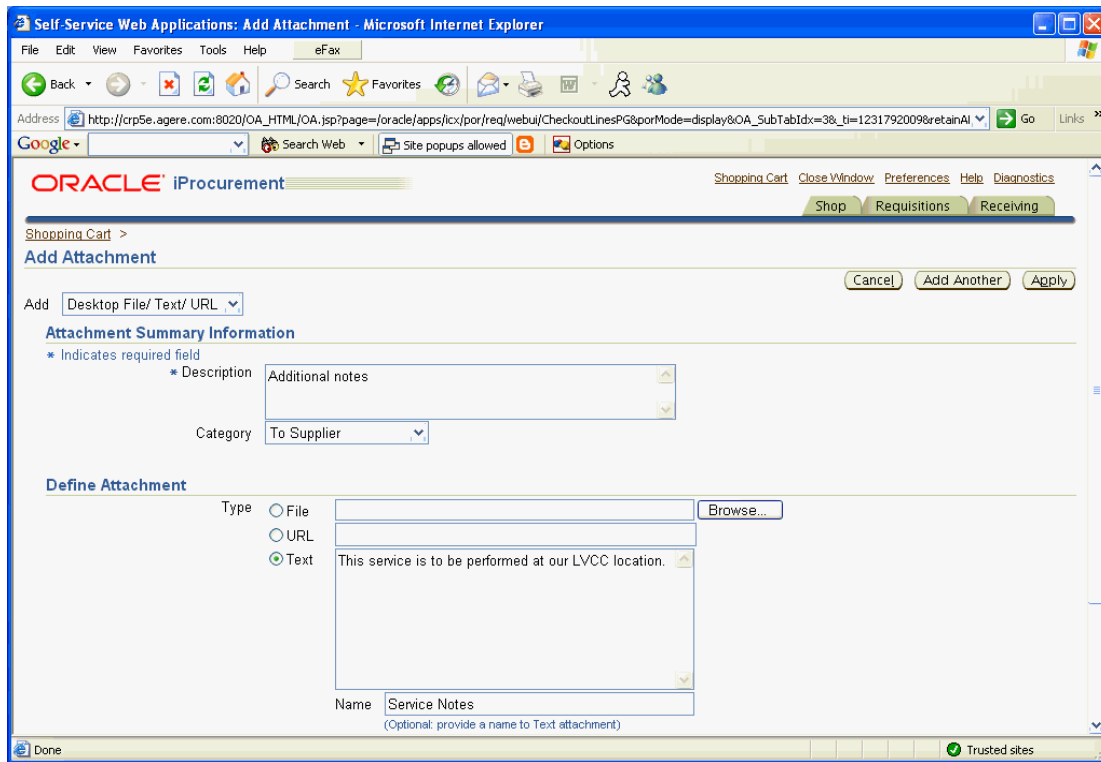
Goto task #38

34. Click on the Text radio button.

35. Enter the Text for the attachment.

If you need to enter a large amount of text, it may be better to enter the text in a file and use a file attachment.

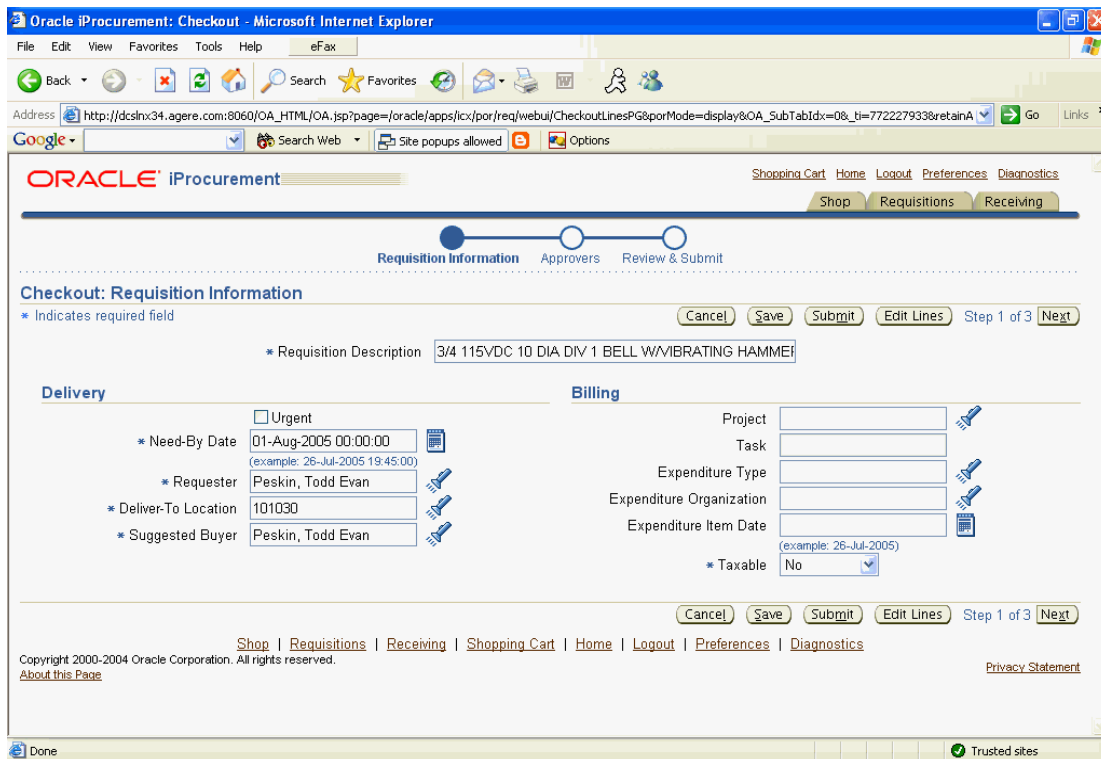
36. Specify a Name for the attachment if desired.



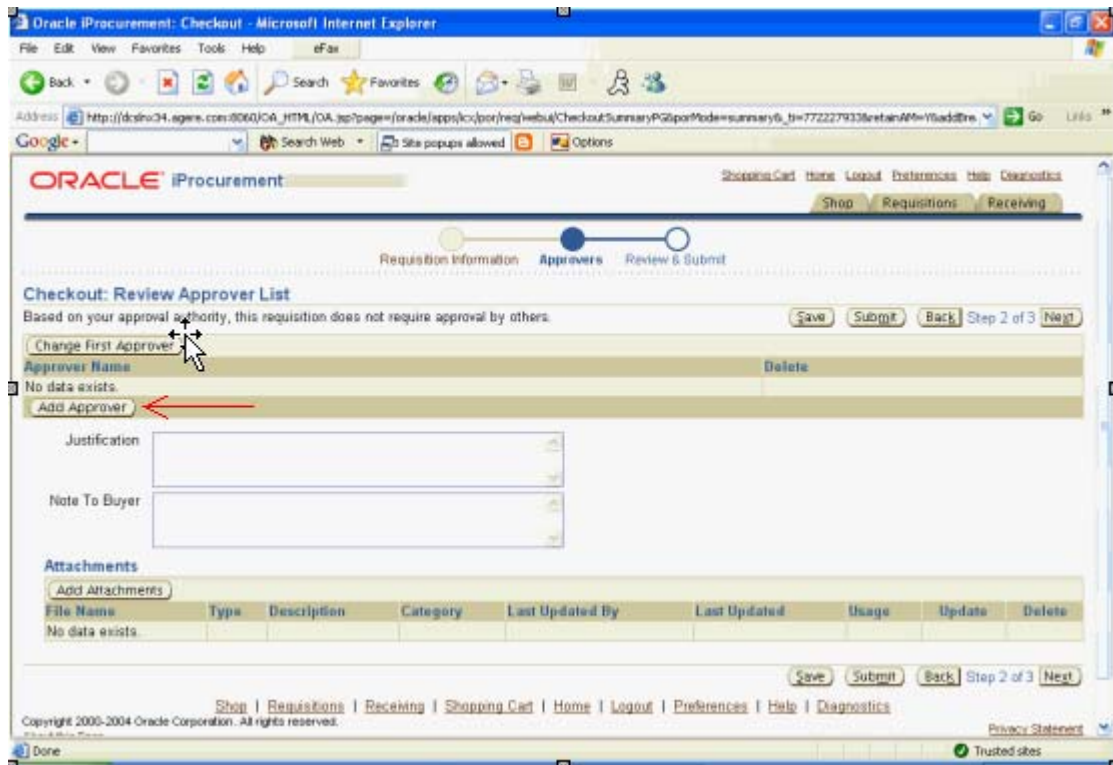
37. Click (B) Apply.

38. Click (B) Add Attachments to add attachments that apply to the entire requisition.

39. Click (B) Return.



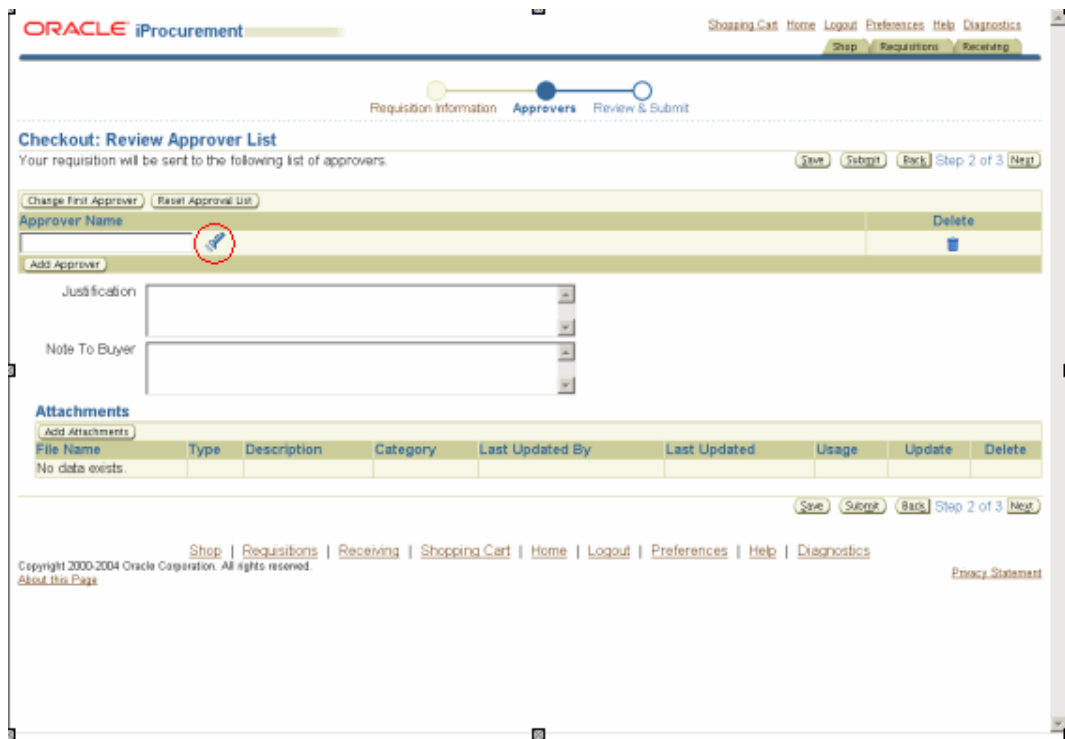
40. Click (B) Next



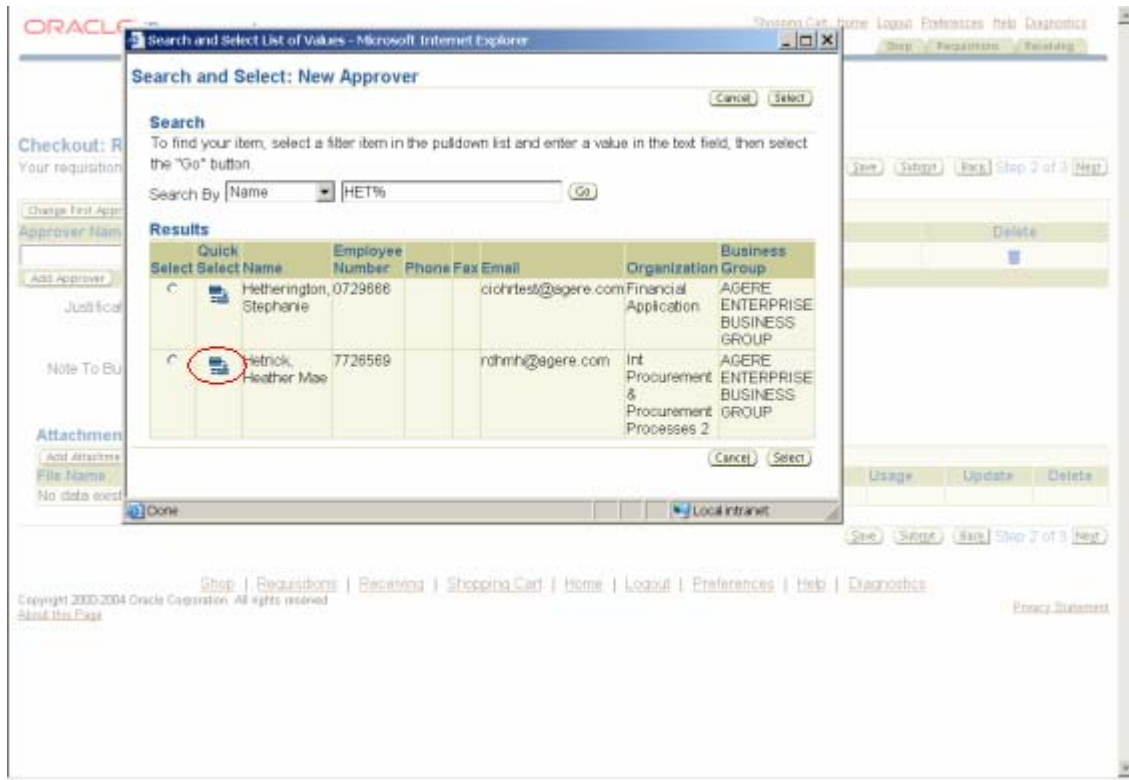
41. Add additional approvers if desired.

If adding an additional approver, goto task #42. Otherwise, goto task #46.

42. Click the flashlight icon to search for an approver.

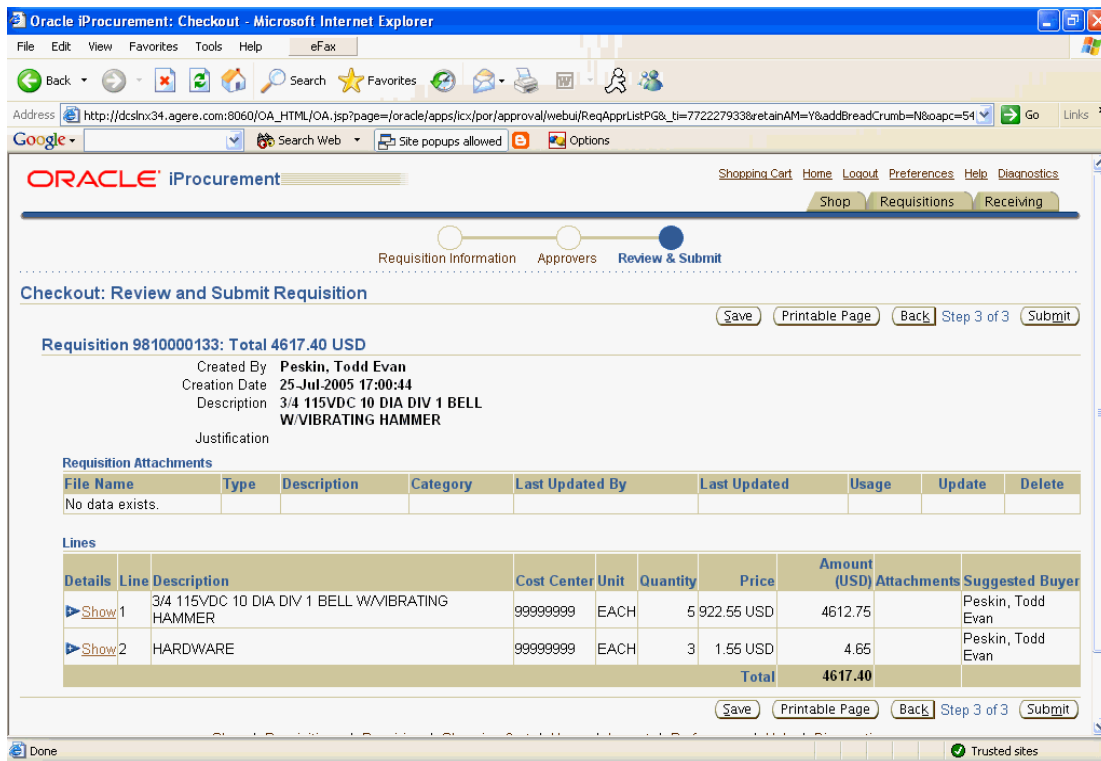


43. Search for an Approver name using partial value (i.e. HET%)
44. Select the appropriate approver.
45. Click (B) Select.

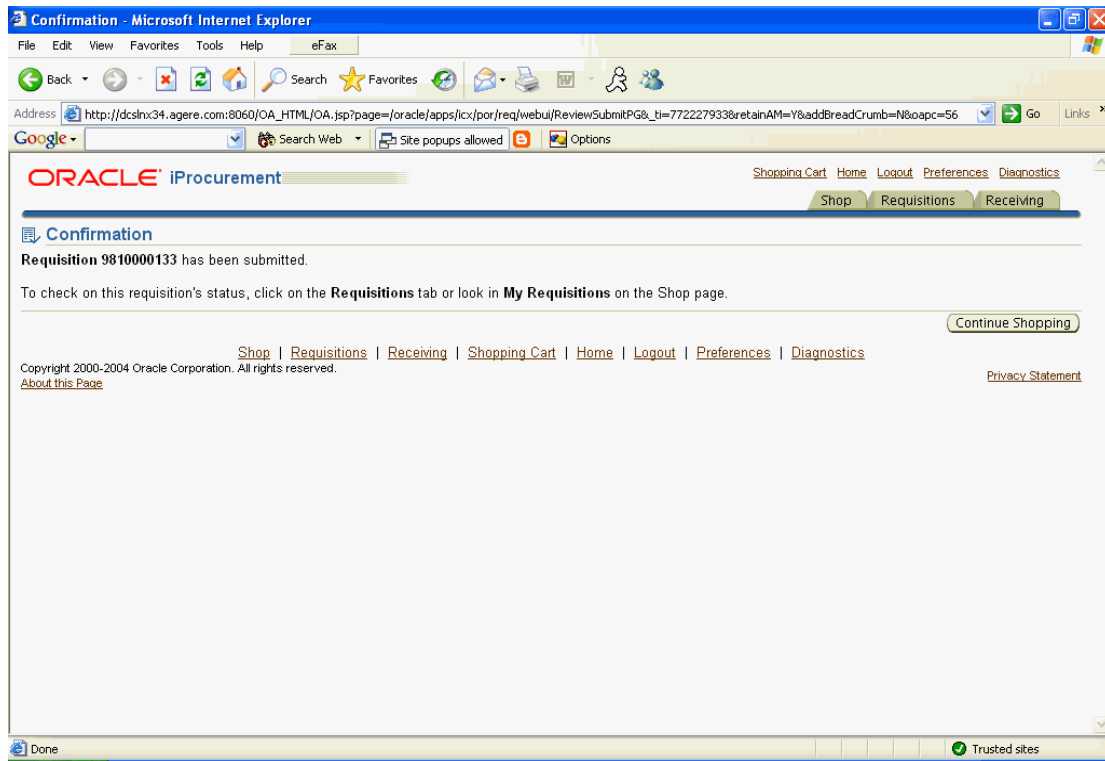


46. Specify a Justification for your approvers or a Note to Buyer if desired.

47. Click (B) Next.



48. Review the details of the requisition and click (B) Submit when satisfied with the information.

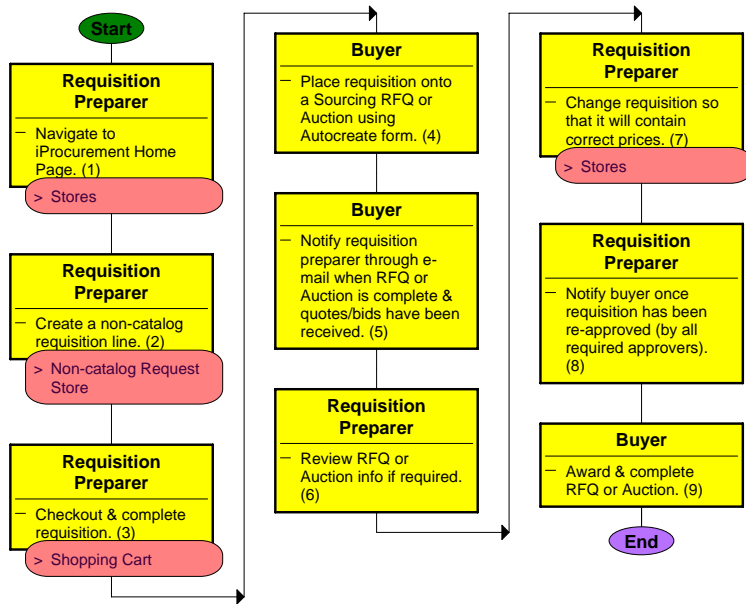


End of activity.

Create an iProcurement Requisition to Request an RFQ

Create an iProcurement Requisition to Request an RFQ

Create an iProcurement Requisition to Request an RFQ



Update the Prices on a Requisition in iProcurement

iProcurement

N > iProcurement > (ST) Shop

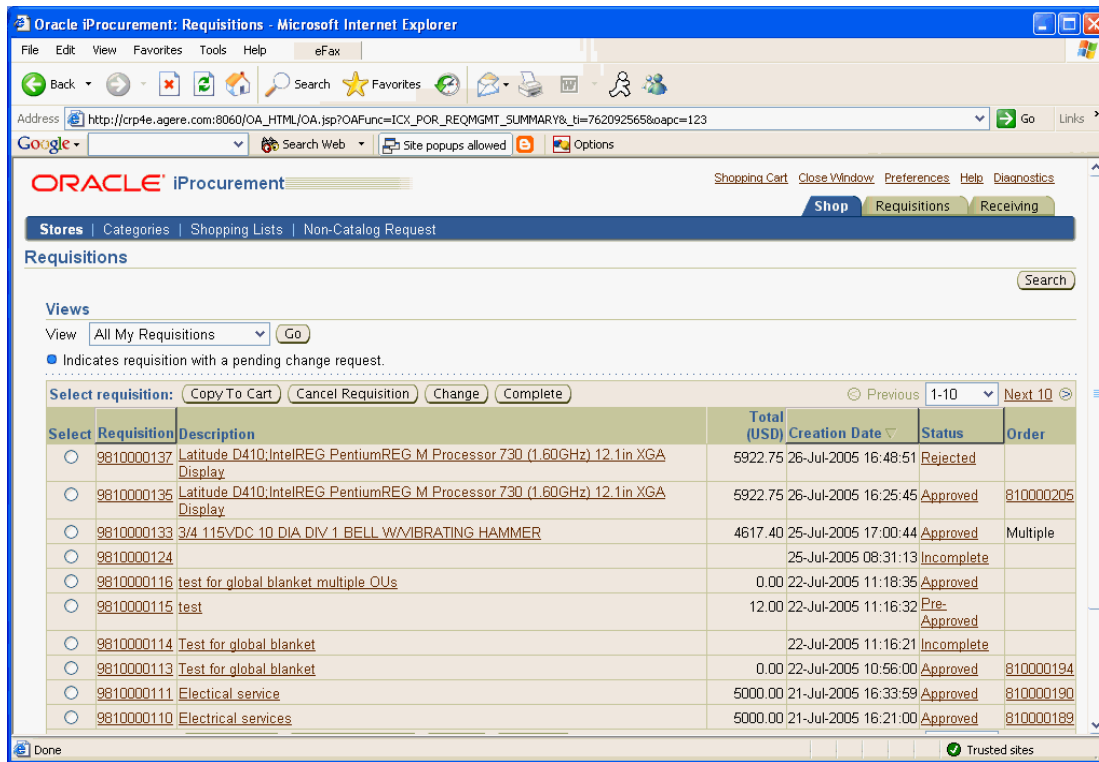
Stores

Requisition	Description	Total (USD)	Status	Copy	Change	Express Receive
9810000137	Latitude D410; IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	5922.75	Rejected	[icon]	[icon]	
9810000135	Latitude D410; IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	5922.75	Approved	[icon]	[icon]	
9810000133	3/4 115VDC 10 DIA DIV 1 BELL W/MBRATING HAMMER	4617.40	Approved	[icon]	[icon]	[icon]
9810000124			Incomplete	[icon]		
9810000116	test for global blanket multiple OUs	0.00	Approved	[icon]	[icon]	

1. View the My Requisitions section of the home page.

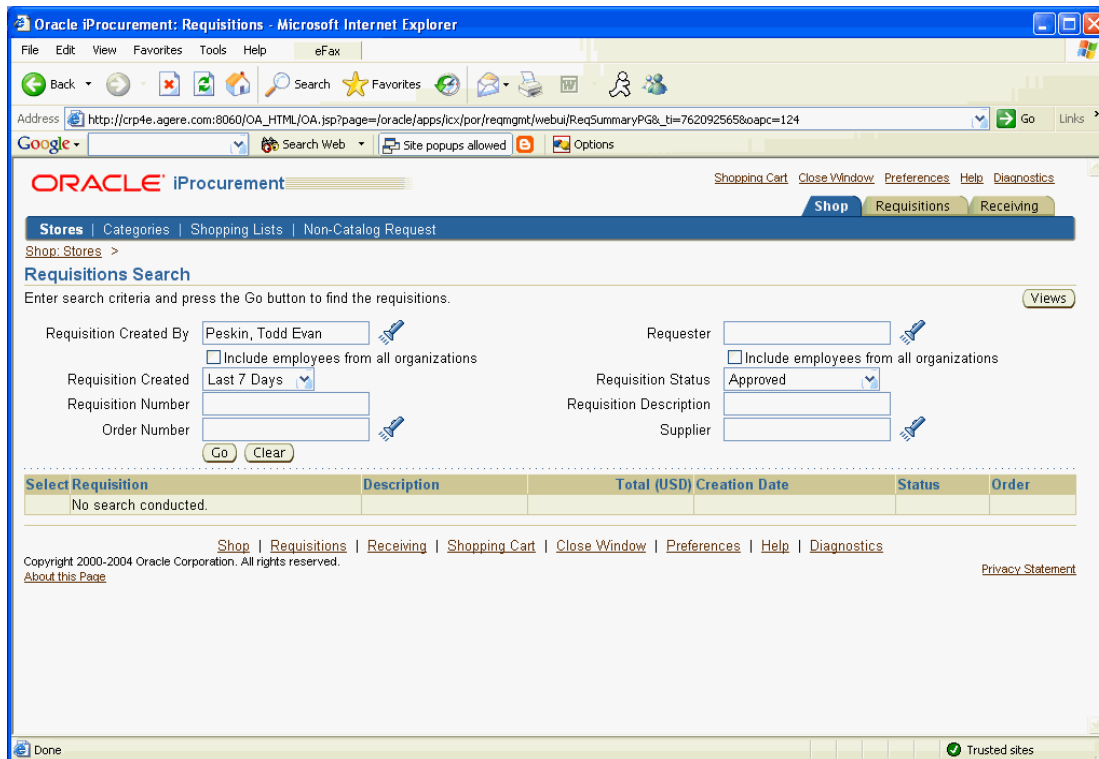
If the requisition is not listed, goto task #2. Otherwise, goto task #6.

2. Click (B) Full List.



If the requisition is still not listed, goto task #3. Otherwise, goto task #6.

3. Click (B) Search.



4. Specify the appropriate search criteria.

You can enter an alternate requestor or preparer (Requisition Created By) if desired.

The creation date window can be entered.

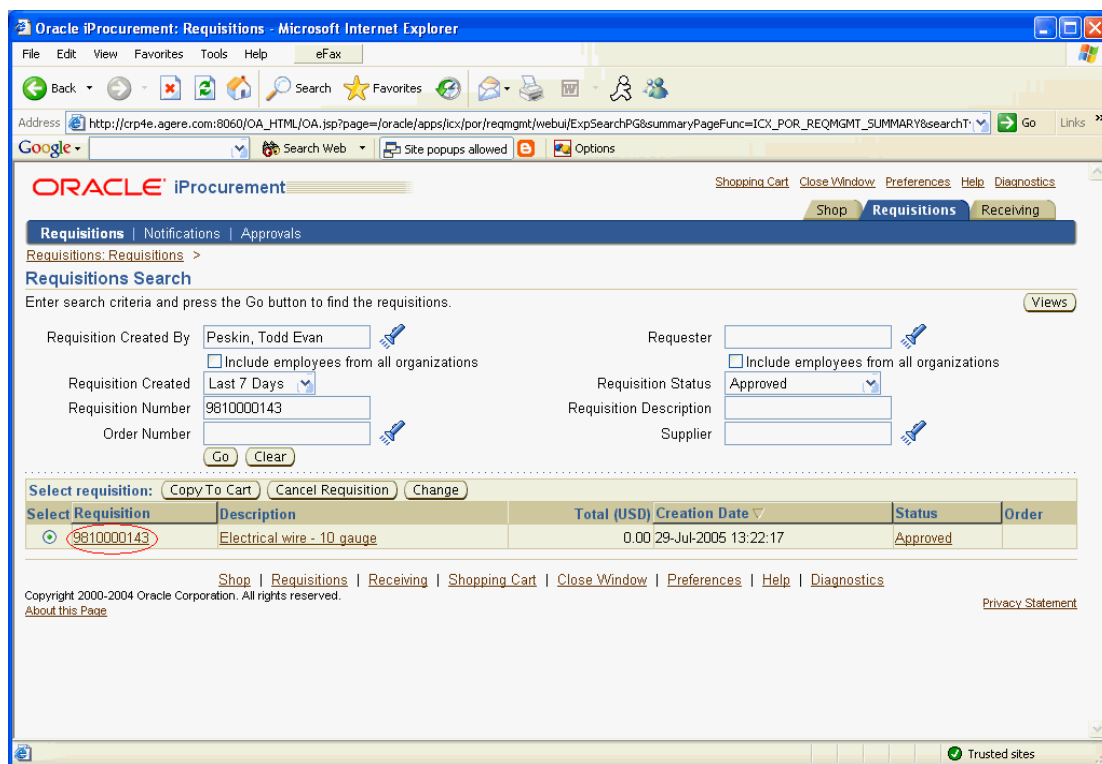
A search can be performed using an exact Requisition Number or Order Number (PO Number).

The Requisition Status can be specified.

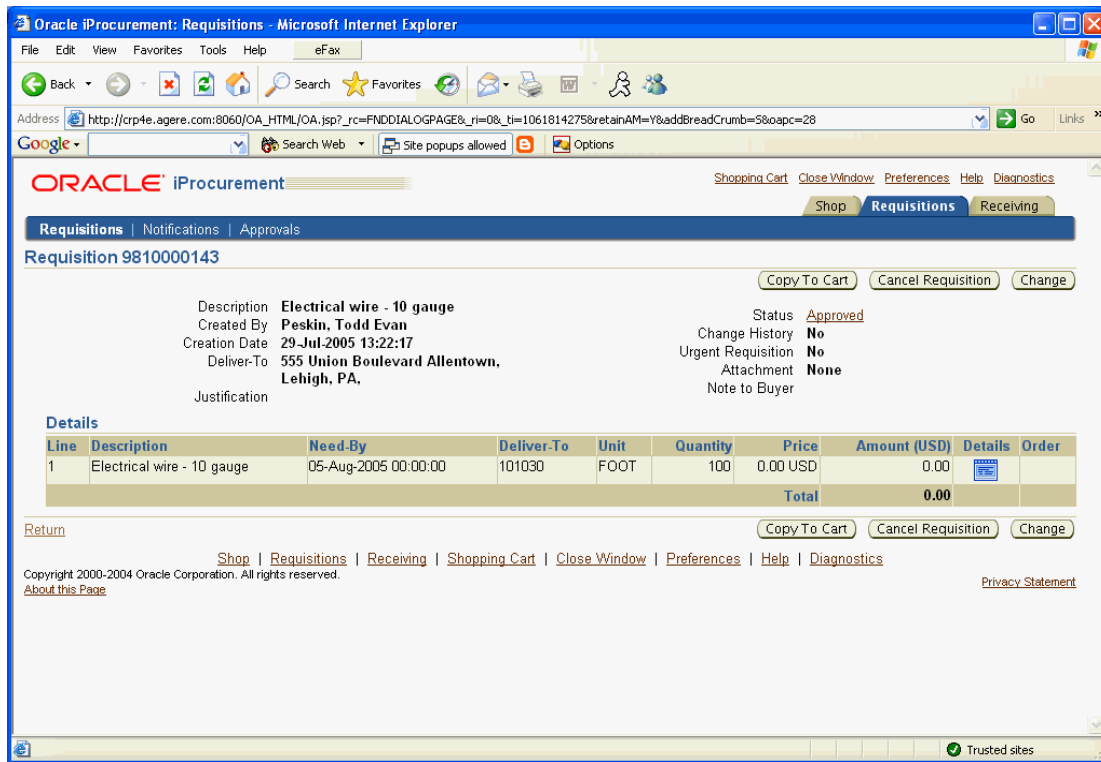
A search can be performed using all or part of the requisition description. The '%' wildcard can be used.

The search can be performed on the Supplier as well.

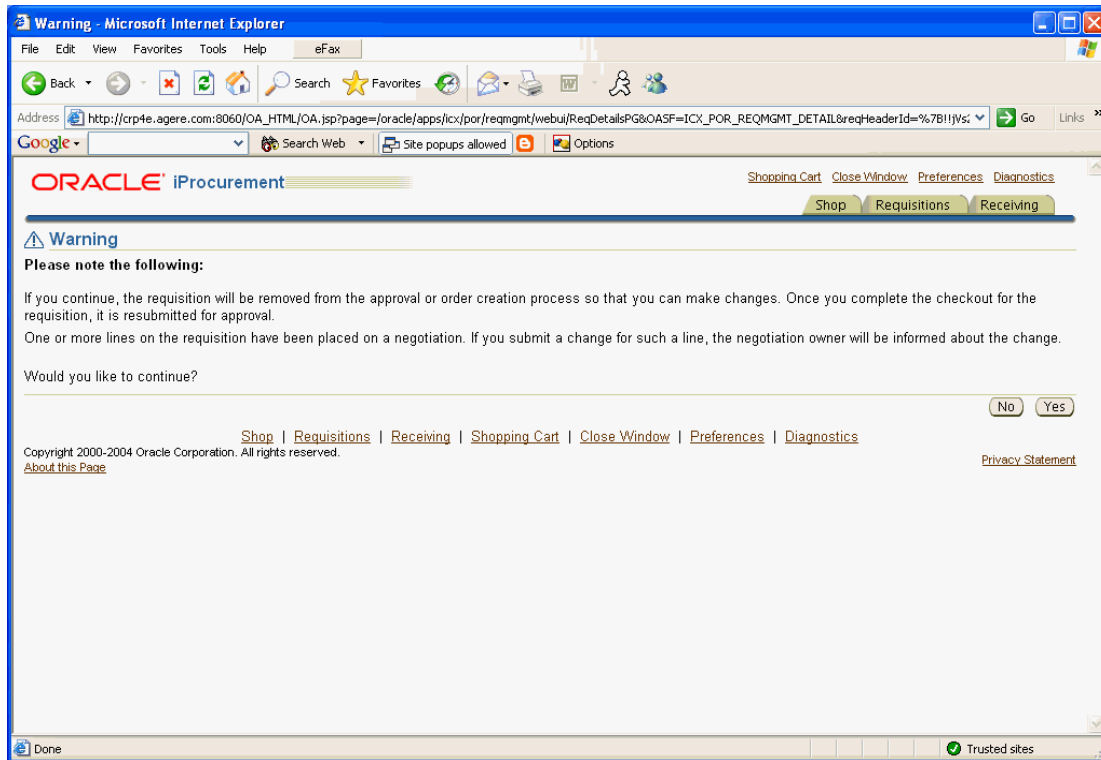
5. Click (B) Go.



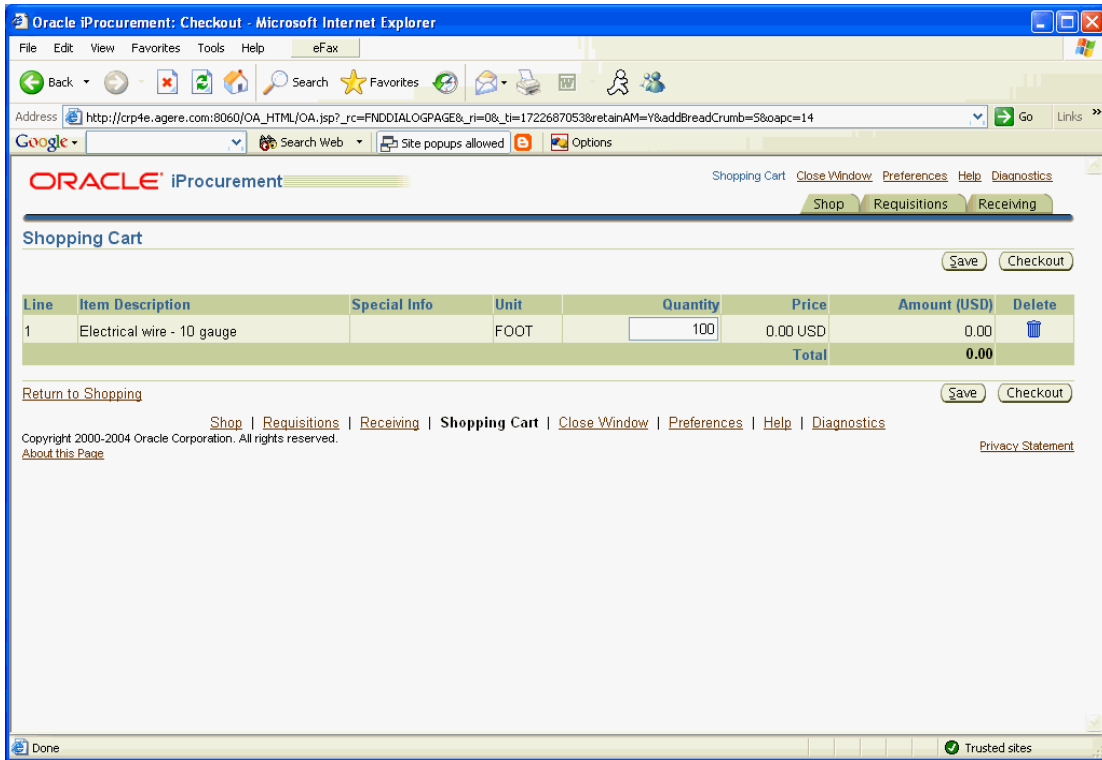
6. Click on the appropriate Requisition link.



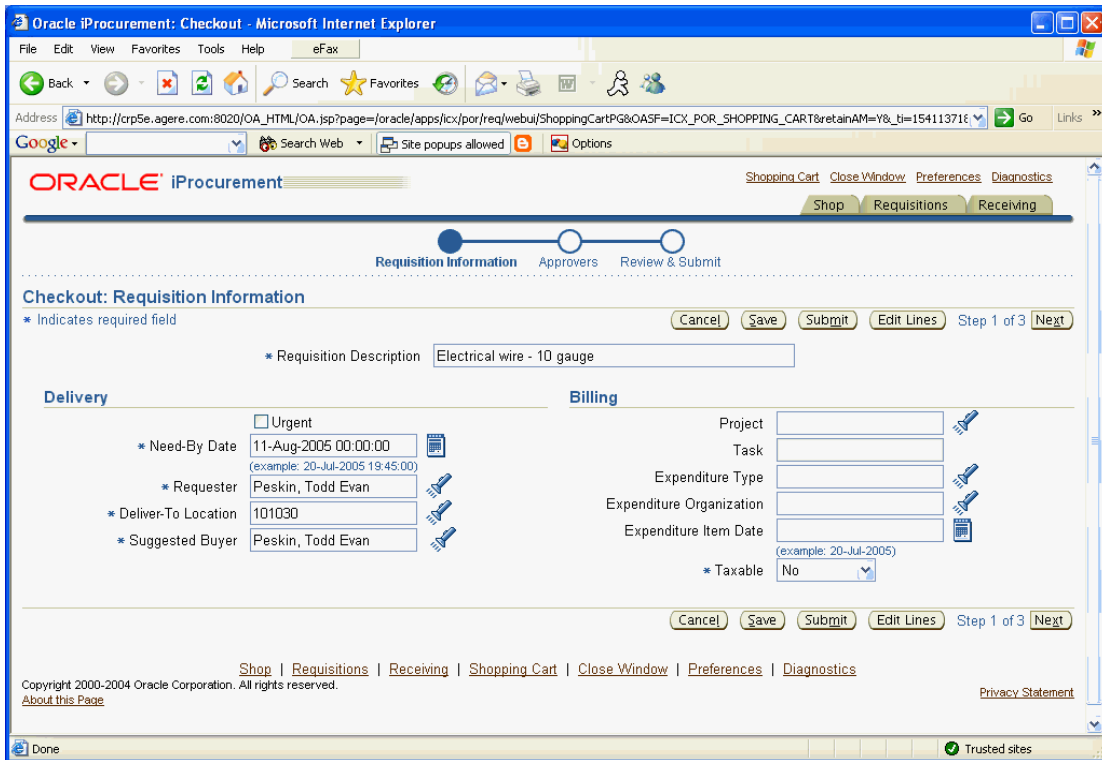
7. Click (B) Change.



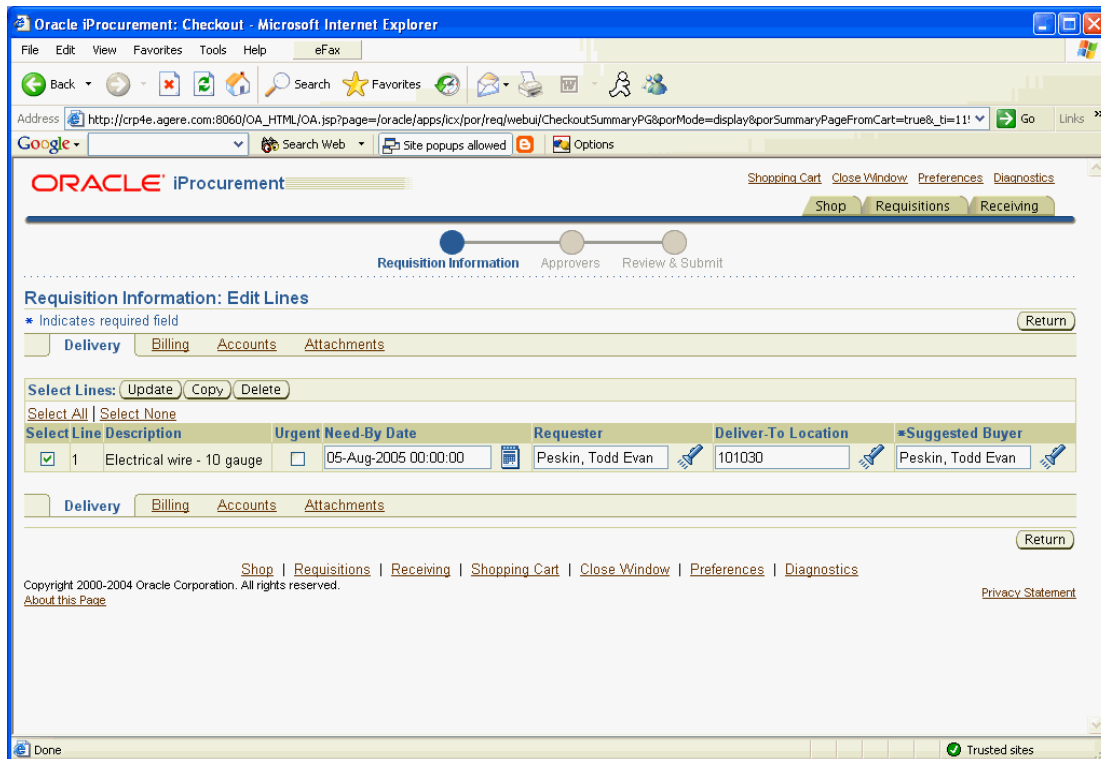
8. Click (B) Yes.



9. Click (B) Checkout.

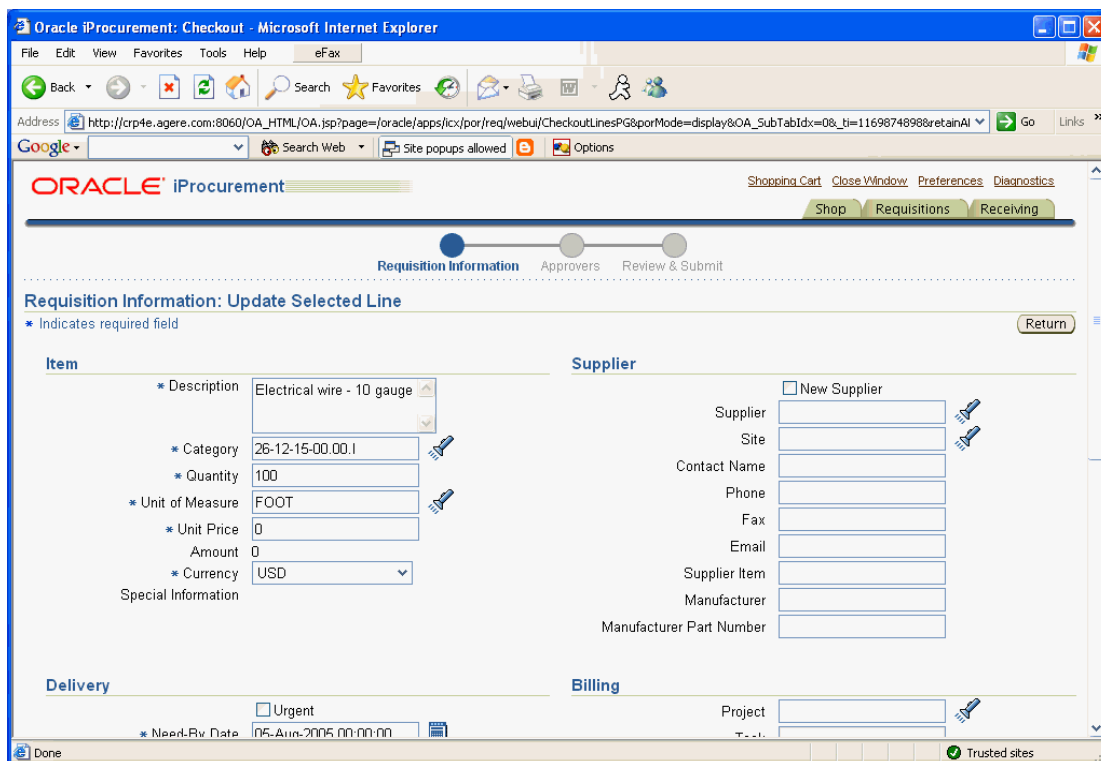


10. Click (B) Edit Lines.



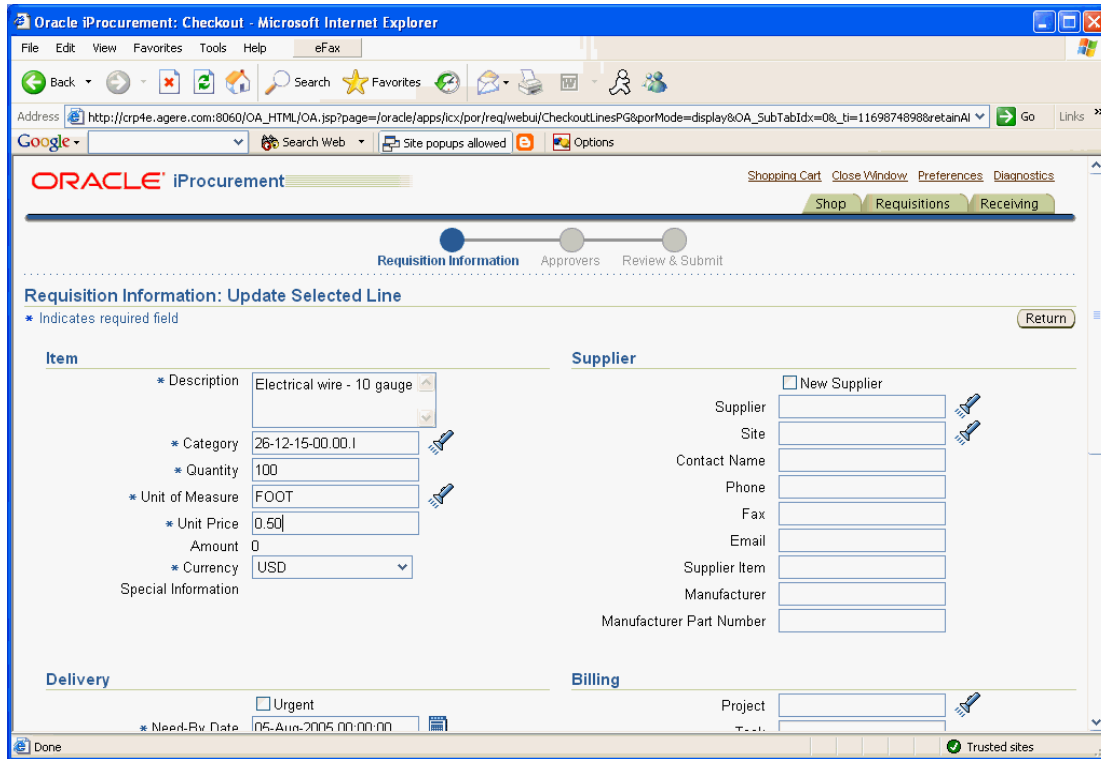
11. Select one line and click (B) Update.

Each line must be updated individually. The price cannot be updated if you select multiple lines at one time.



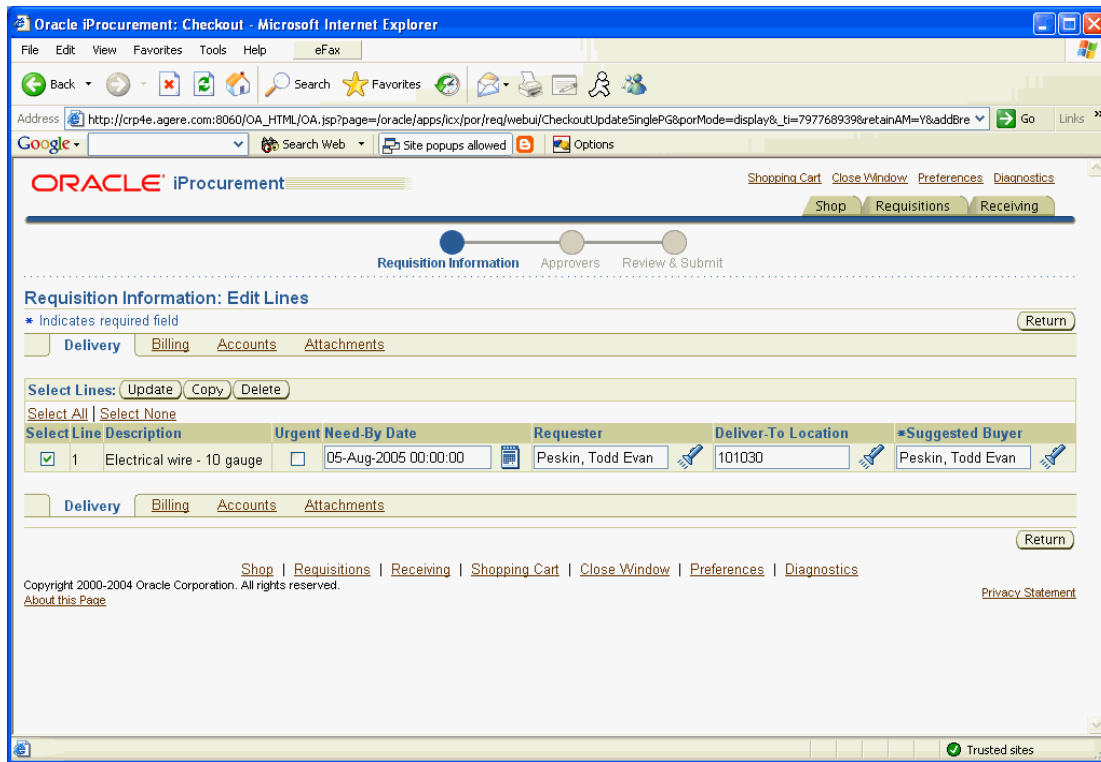
Copyright © Oracle, 2004. All rights reserved.

12. Modify the price to reflect the correct price obtained from the supplier through the RFQ or Auction.

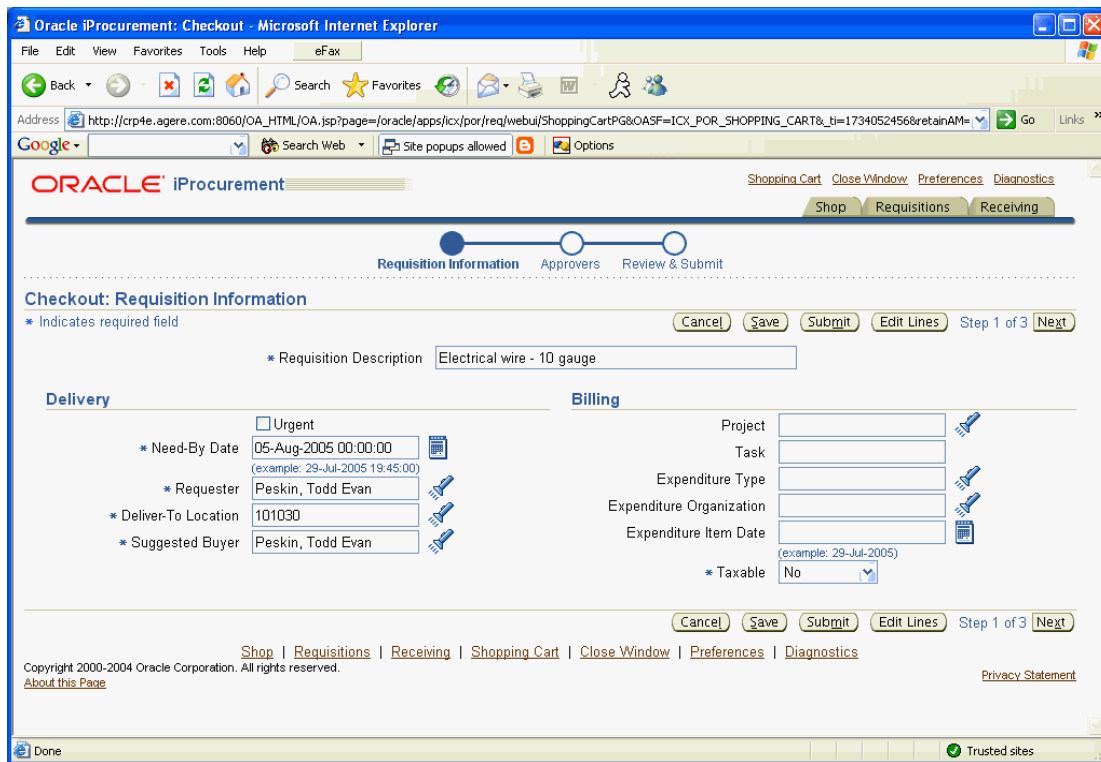


13. Click (B) Return.

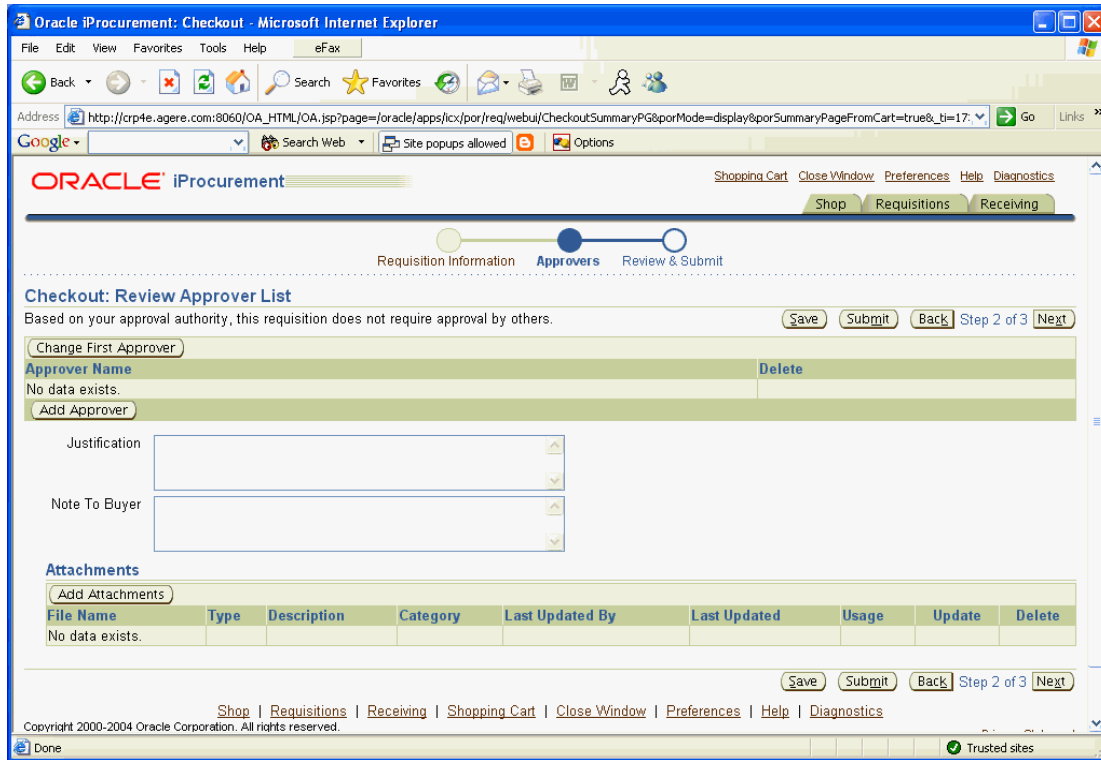
If more lines need to be updated, goto task #11. Otherwise, goto task #14.



14. Click (B) Return.

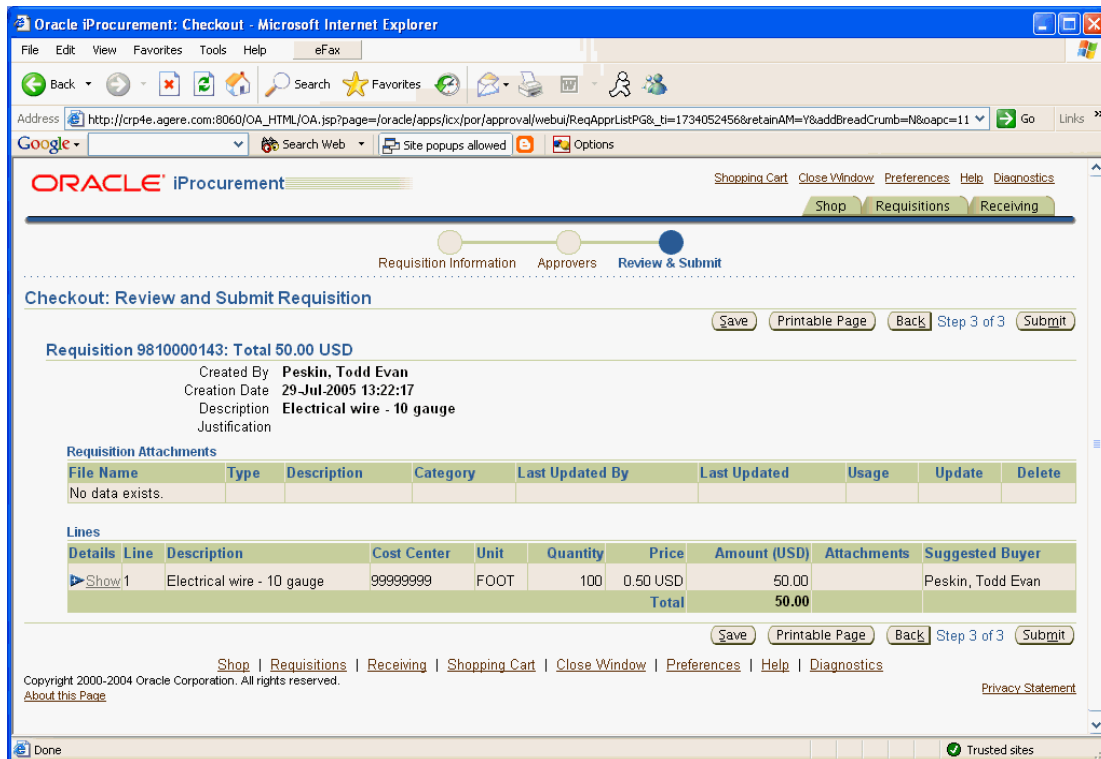


15. Click (B) Next.



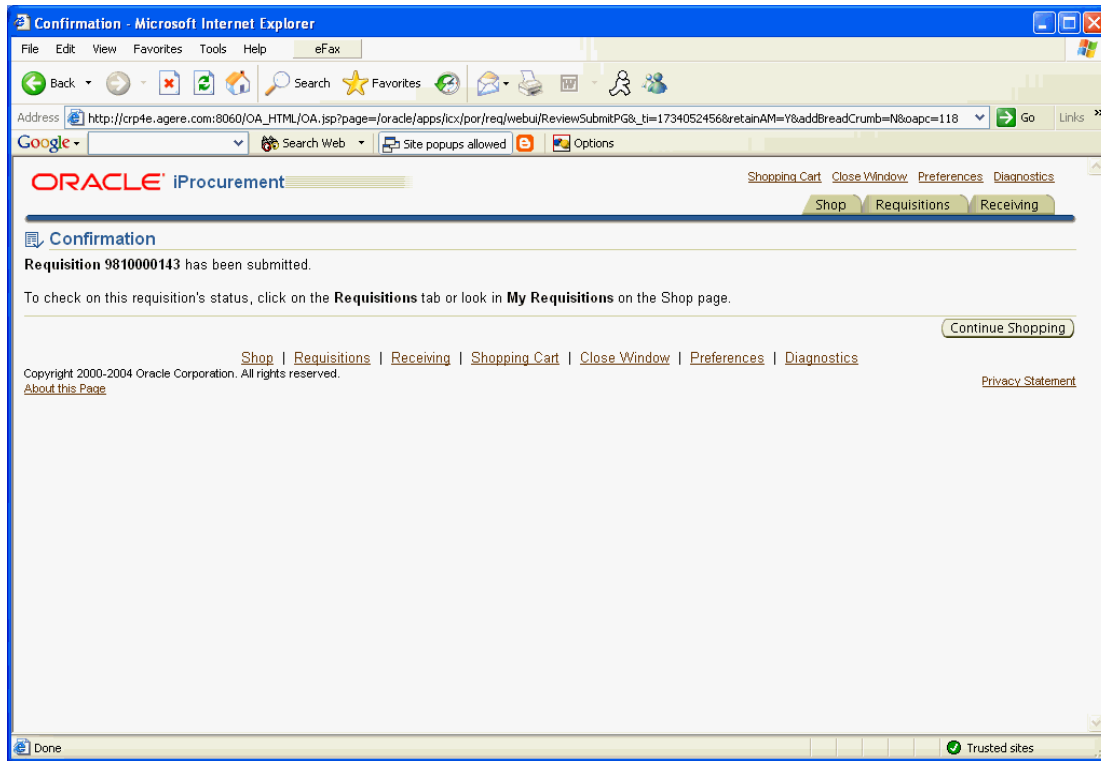
16. Add additional approvers if required.

17. Click (B) Next.



18. Review the requisition.

19. Click (B) Submit.



End of activity.

Receiving in iProcurement

Receive an Item in iProcurement

iProcurement

N > iProcurement > (ST) Receiving

Receiving

Oracle iProcurement: Receiving - Microsoft Internet Explorer

Address: http://crpte.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/pxc/por/rcv/webui/pxcPorRcvHomePG&_t=762092565&oaopc=58&OAMC=77414_19_0&menu=Y&oaM...

ORACLE iProcurement

Shop Requisitions Receiving

Search Items to Receive Find by Requisition Number Go

Receiving

Select the receiving action you want to perform.

- Receive Items
- Return Items
- Correct Receipts
- View Receipts

Requisitions to Receive

Click **Express Receive** to directly create receipts with the receipt values automatically defaulted. [Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
9810000135	Latitude D410,IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	DELL COMPUTER INC	810000205	Express Receive
9810000133	3/4 115VDC 10 DIA DIV 1 BELL W/VIBRATING HAMMER	Multiple	Multiple	Express Receive
9810000113	Test for global blanket	SYNOPSIS INC	810000194	Express Receive
9810000111	Electrical service	JJM_SUPPLIER	810000190	Express Receive
9810000110	Electrical services	JJM_SUPPLIER	810000189	Express Receive

My Receipts at a Glance

Click **View Details** to view receipt details. [Full List](#)

Receipt	Item Description	Receipt Date	Transaction Date	Supplier	View Details
No data exists.					

Receiving Process

- Receive**
Record receipt of the items you ordered, or receive on behalf of others.
[Receive Items](#)
- Return**
Need to send items back to the supplier?
[Return Items](#)
- Correct**
Did you record the wrong receipt quantity?
[Correct Receipts](#)
- View**
View receipts with all associated returns and corrections.
[View Receipts](#)

1. Determine type of action.

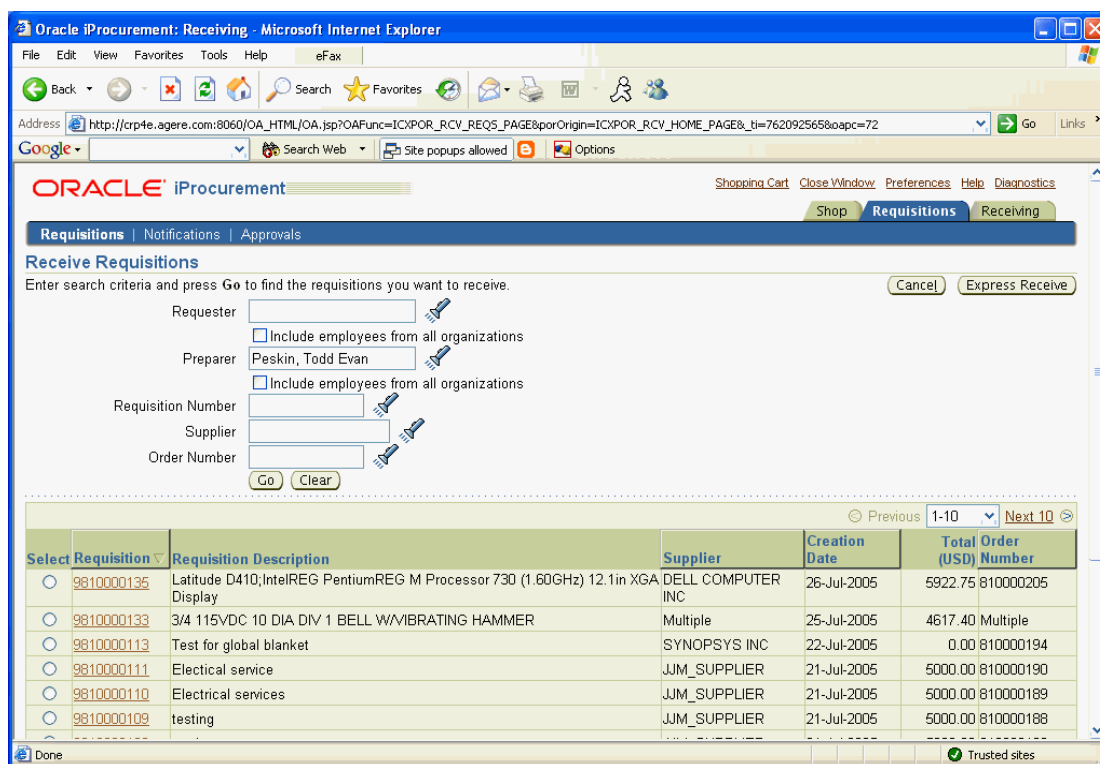
Express Receive - no entry of receipt details; full receipt of ordered quantity.

If the requisition is missing in the Requisitions to Receive list, goto task #2.

If using Express Receive, goto task #7.

If performing a detailed receipt, goto task #10.

2. Click (B) Full List.

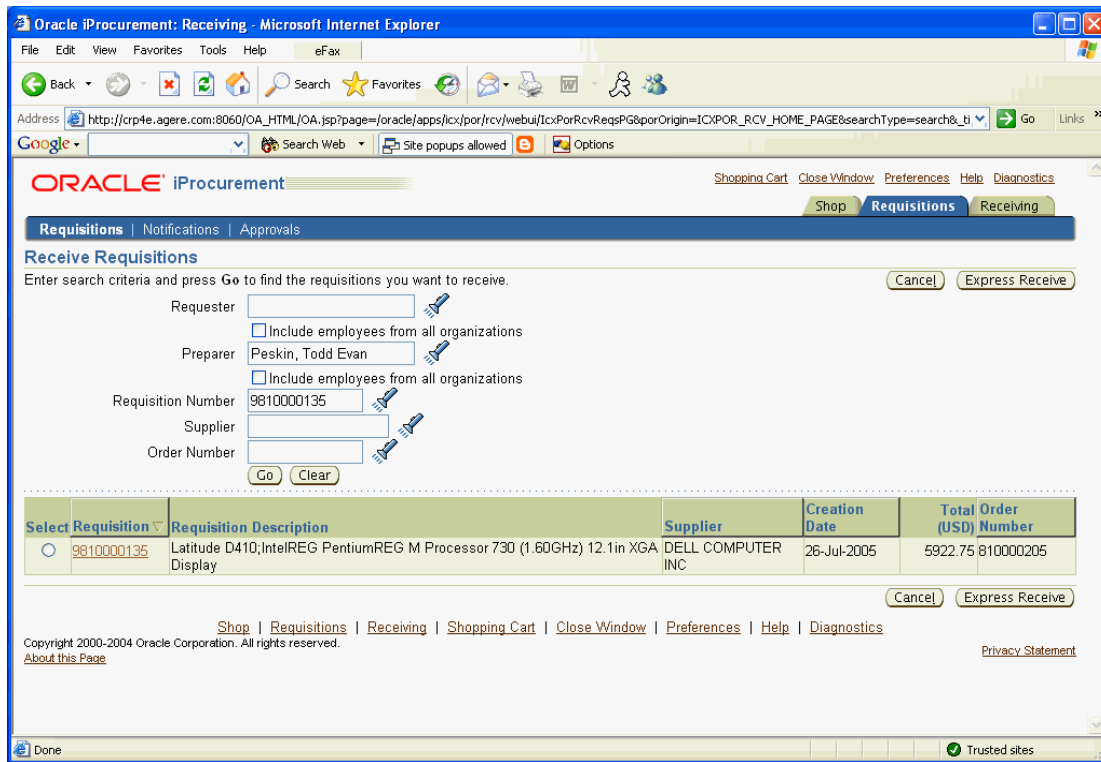


3. Enter the appropriate search criteria.

You can search for requisitions created by other users by specifying the appropriate Preparer or Requester.

- Perform a search by using the Requisition Number or Order Number (PO Number).

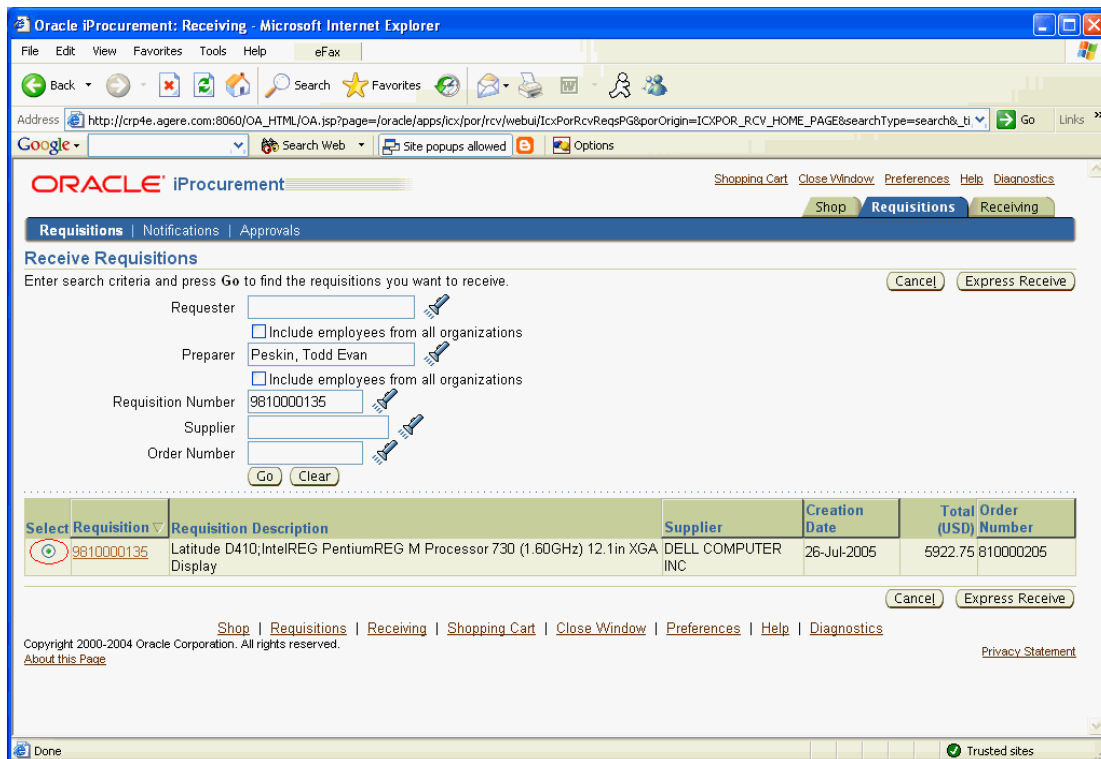
4. Click (B) Go.



Express Receive - no entry of receipt details; full receipt of ordered quantity.

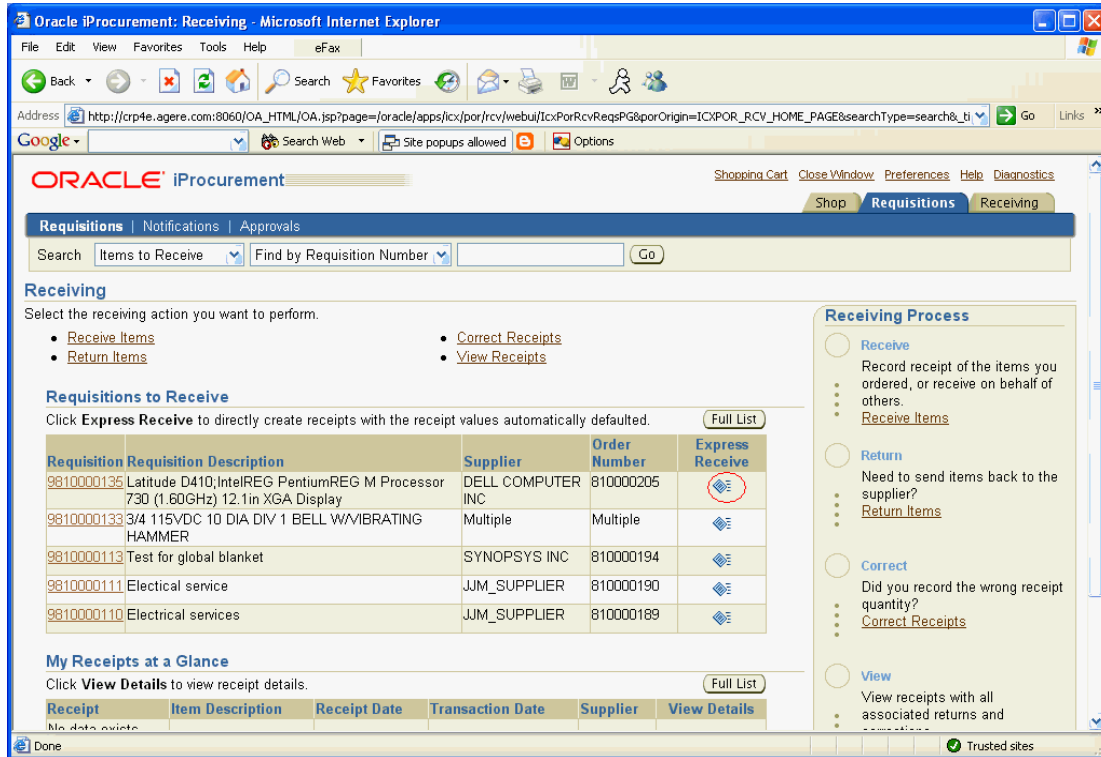
If using Express Receive, goto task #5. Otherwise, goto task #10.

5. Select the appropriate requisition by clicking on the Select radio button.

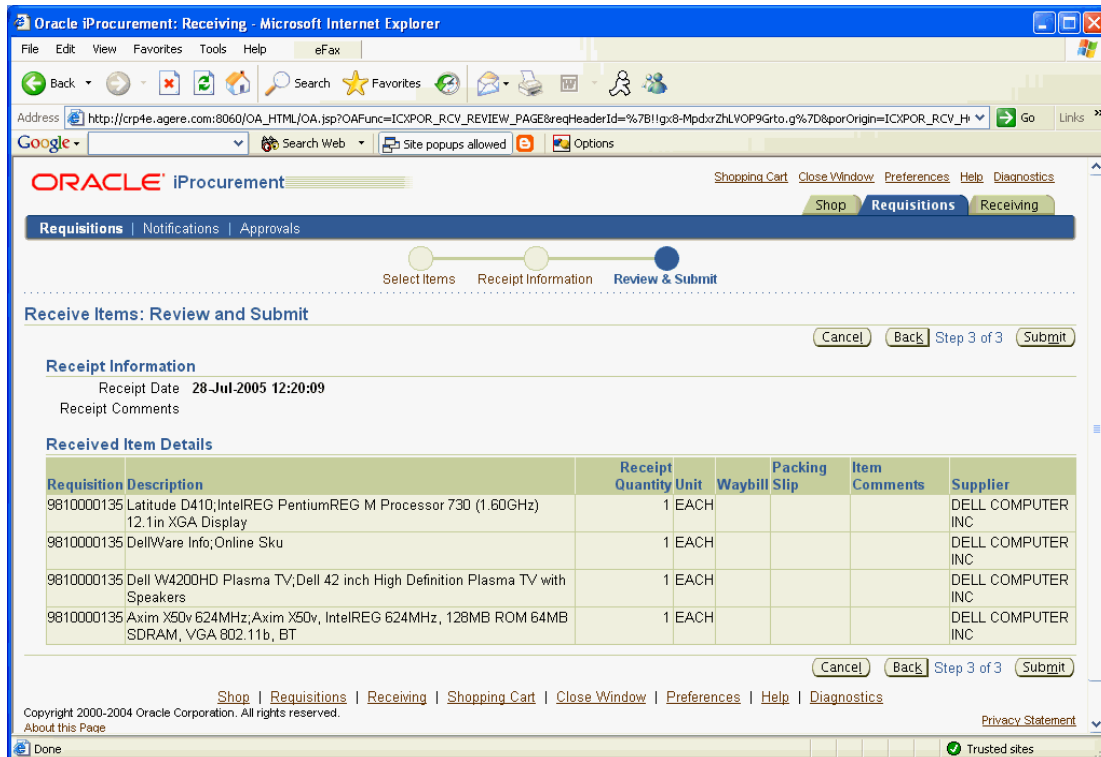


6. Click (B) Express Receive.

Goto task #9



7. Click (I) Express Receive.



8. Review the receipt information.

9. Click (B) Submit.

End of activity.

10. Click on the requisition link for the appropriate requisition.

Oracle iProcurement: Requisitions - Microsoft Internet Explorer

Address: http://crp4e.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/px/por/rcv/webui/IcxPorRcvHomePG8_tj=7620925658retainAM=N8&addBreadcrumb=N8&opc=69

ORACLE iProcurement

Shopping Cart Close Window Preferences Help Diagnostics

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions: Requisitions >

Requisition 9810000135

Copy To Cart Cancel Requisition Change Receive

Description Latitude D410: IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display

Created By Peskin, Todd Evan

Creation Date 26-Jul-2005 16:25:45

Deliver-To 555 Union Boulevard Allentown, Lehigh, PA,

Status Approved

Change History No

Urgent Requisition No

Attachment None

Note to Buyer

Justification

Details

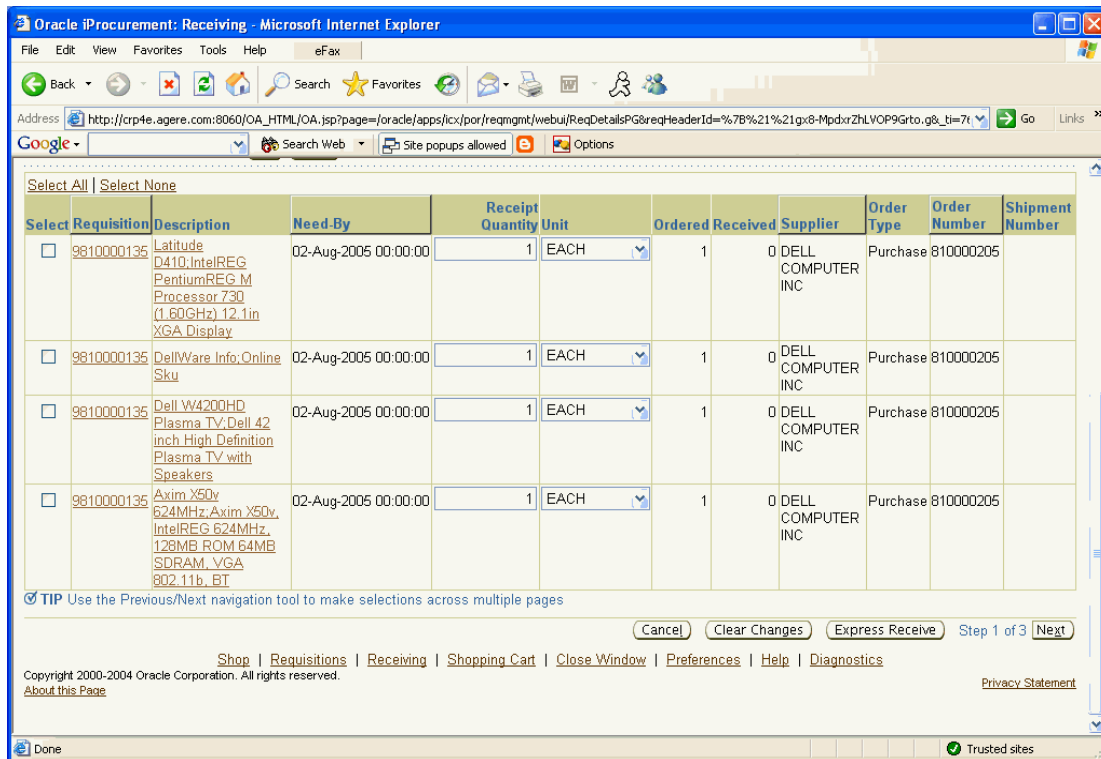
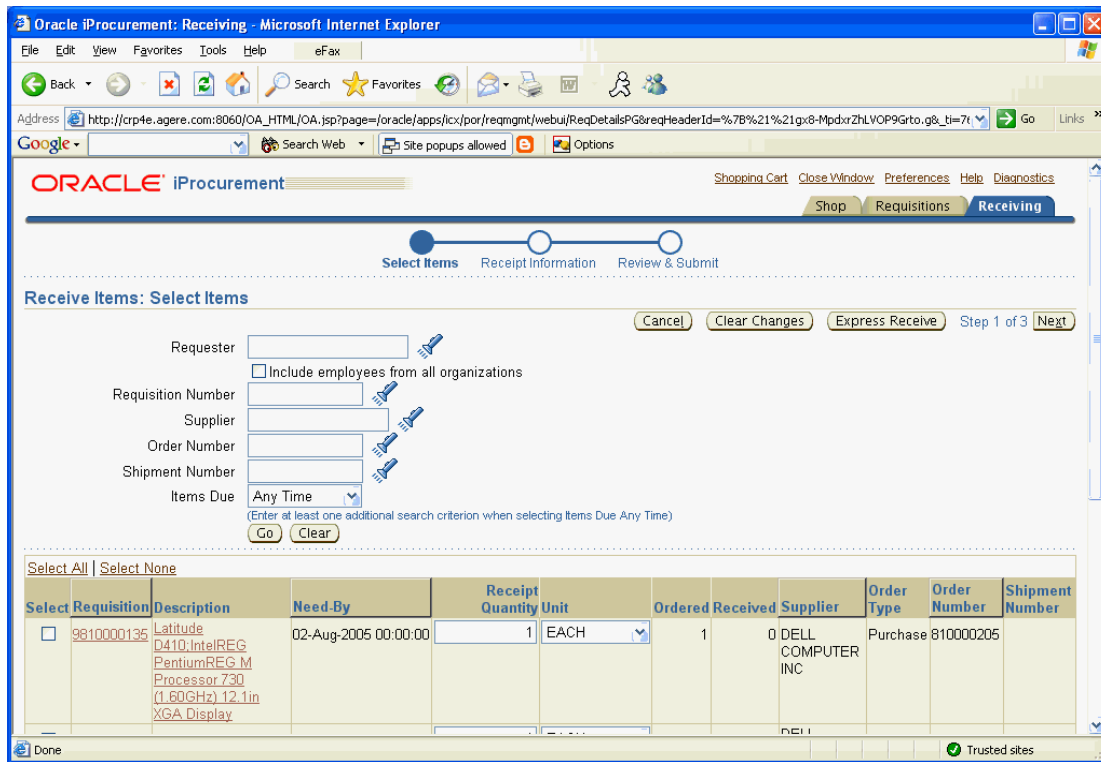
Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	Latitude D410: IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	02-Aug-2005 00:00:00	101030	EACH	1	1640.00 USD	1640.00		810000205
2	DellWare Info Online Sku	02-Aug-2005 00:00:00	101030	EACH	1	862.87 USD	862.87		810000205
3	Dell W4200HD Plasma TV: Dell 42 inch High Definition Plasma TV with Speakers	02-Aug-2005 00:00:00	101030	EACH	1	2951.02 USD	2951.02		810000205
4	Axim X50v 624MHz, Axim X50v, IntelREG 624MHz, 128MB ROM 64MB SDRAM, VGA 802.11b, BT	02-Aug-2005 00:00:00	101030	EACH	1	468.86 USD	468.86		810000205
Total							5922.75		

Return

Copy To Cart Cancel Requisition Change Receive

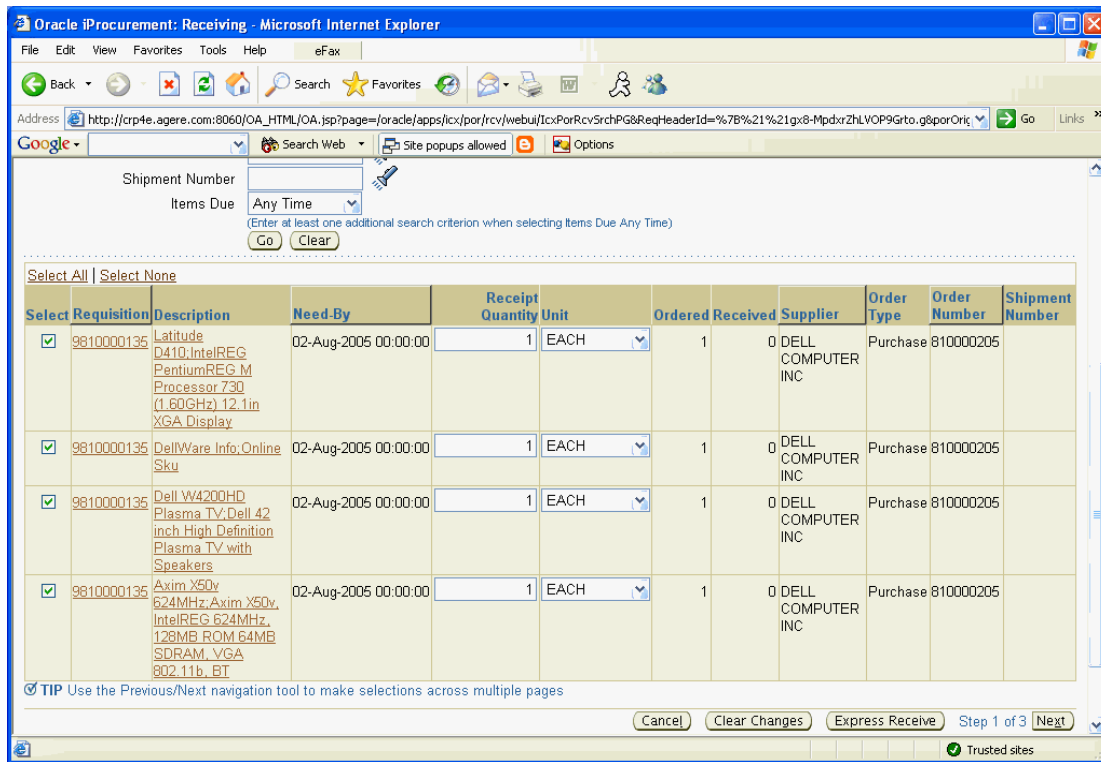
Done Trusted sites

11. Click (B) Receive.



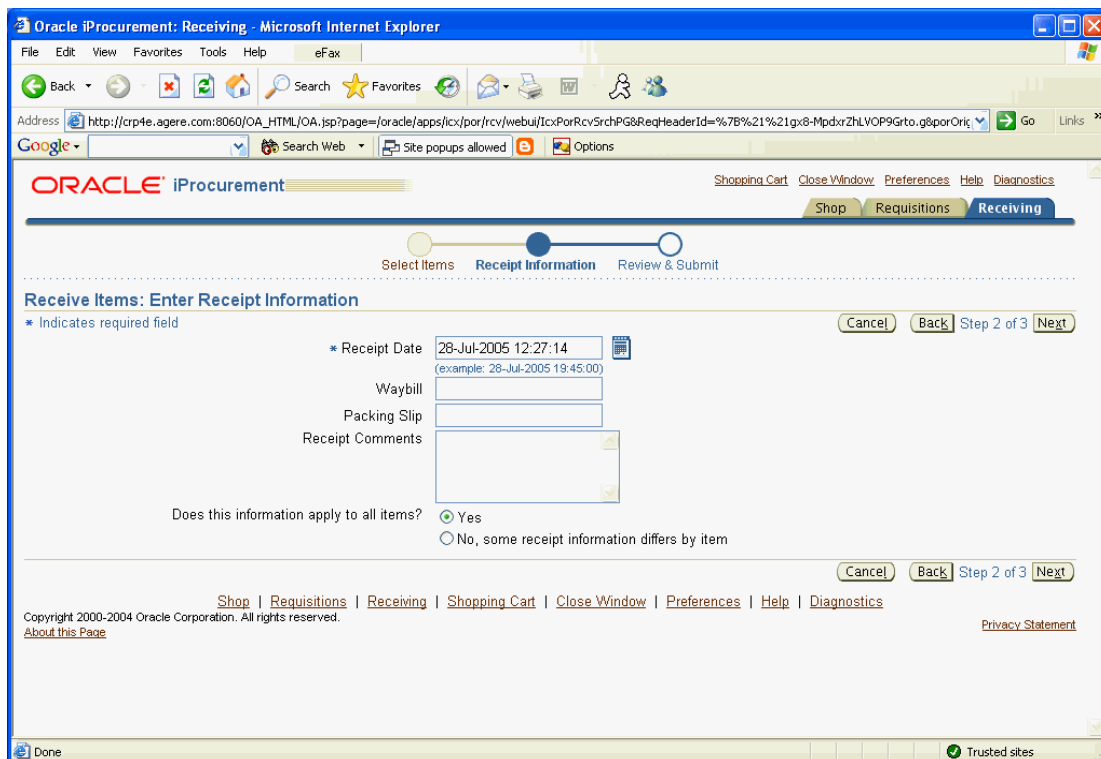
12. Select the lines that you would like to receive.

You can click on the Select All link to quickly select all of the requisition lines.



13. Update the Receipt Quantity and Unit of Measure if desired.

14. Click (B) Next.



15. Enter the correct Receipt Date and time.

16. Enter a Waybill number or Packing Slip if appropriate.

17. Record Receipt Comments if desired.

If the specified information applies to all of the received lines, goto task #22. Otherwise, goto task #18.

18. Click on the radio button for the "No, some receipt information differs by item" option.

19. Click (B) Next.

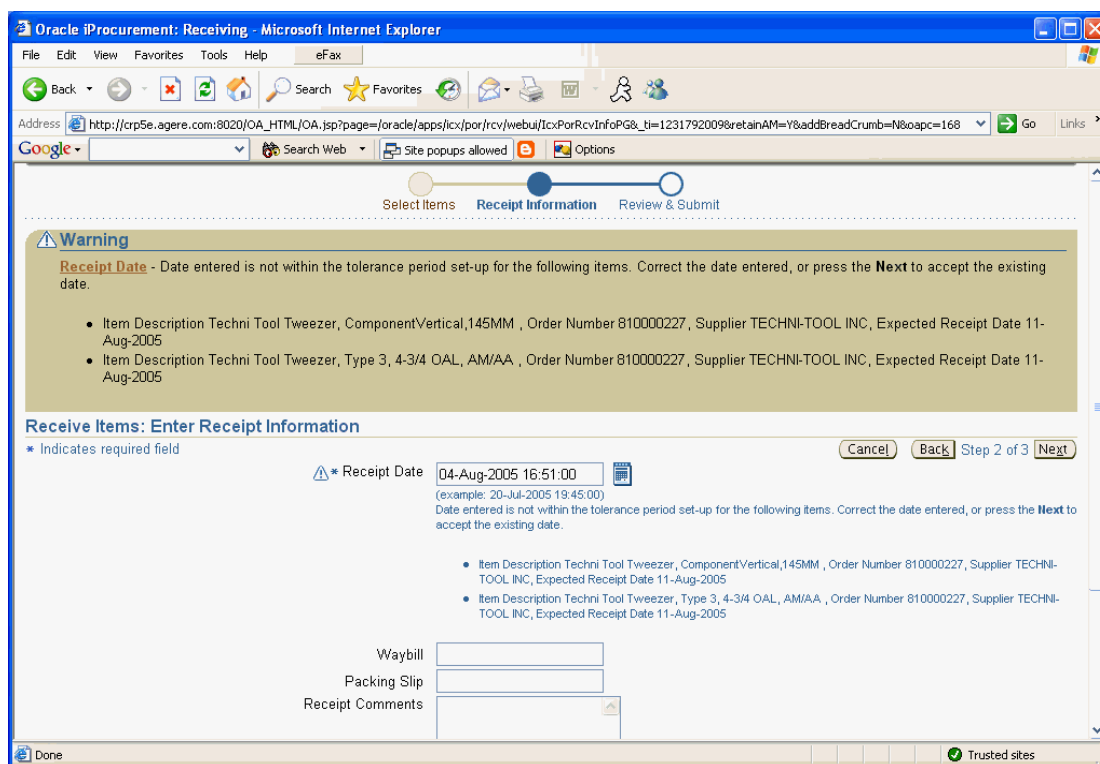
Requisition	Item Description	Unit	Receipt Quantity	Waybill	Packing Slip	Item Comments	Supplier
9810000135	Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	EACH	1				DELL COMPUTER INC
9810000135	DellWare Info;Online Sku	EACH	1				DELL COMPUTER INC
9810000135	Dell W4200HD Plasma TV;Dell 42 inch High Definition Plasma TV with Speakers	EACH	1				DELL COMPUTER INC
9810000135	Axim X50v 624MHz;Axim X50v, IntelREG 624MHz, 128MB ROM 64MB SDRAM, VGA 802.11b, BT	EACH	1				DELL COMPUTER INC

20. Enter a Waybill number or Packing Slip at the line level if appropriate.

21. Enter Item Comments for each line if desired.

22. Click (B) Next.

If a warning page is displayed, goto task #23. Otherwise, goto task #26.



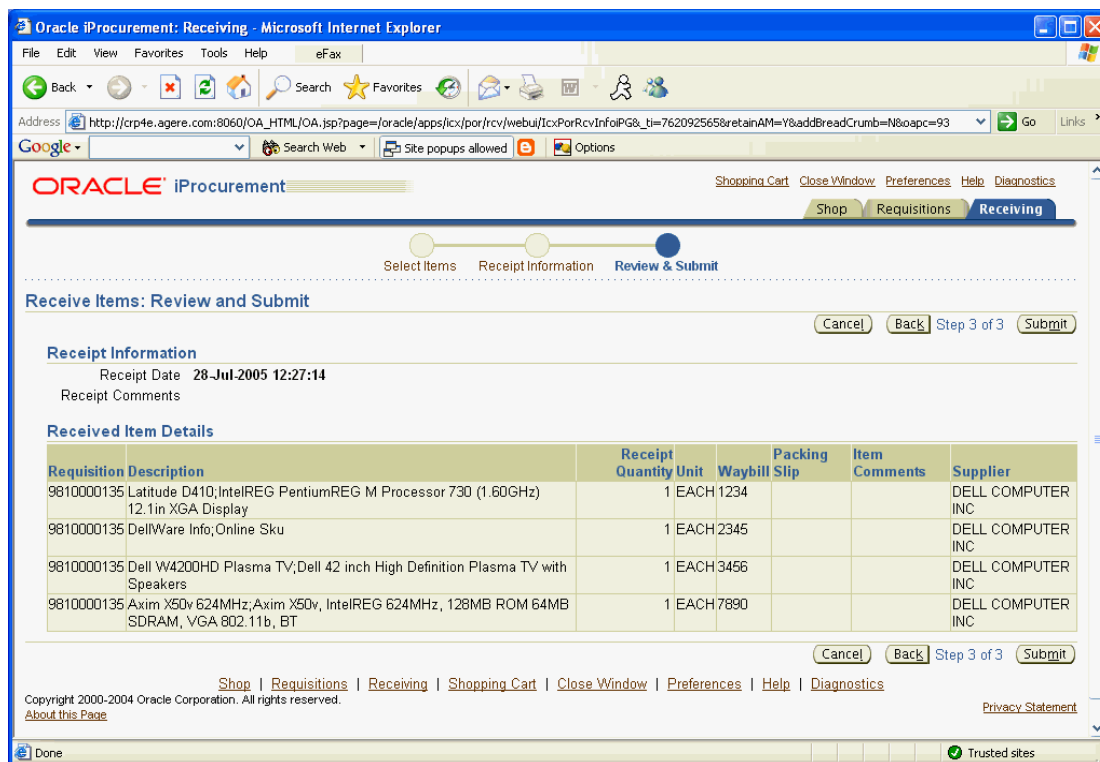
A warning page may be displayed if the item is received earlier or later than expected. This is only a warning, it is still possible to continue with the receipt.

23. Verify that the receipt date is correct.

If the receipt date is correct, goto task #25. Otherwise, goto task #24.

24. Correct the receipt date.

25. Click (B) Next.



26. Review the receipt information.

27. Click (B) Submit.

End of activity.

Return or Correct Receipts in iProcurement

iProcurement

N > iProcurement > (ST) Receiving

Receiving

Oracle iProcurement: Receiving - Microsoft Internet Explorer

Address: http://crpt4e.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/icx/por/rcv/webui/IcxPorRcvHomePG&_t=762092565&oaapc=58&OAMC=77414_19_0&menu=Y&oaM...

ORACLE iProcurement

Shop Requisitions Receiving

Search Items to Receive Find by Requisition Number Go

Receiving

Select the receiving action you want to perform.

- Receive Items
- Return Items
- Correct Receipts
- View Receipts

Requisitions to Receive

Click **Express Receive** to directly create receipts with the receipt values automatically defaulted. [Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
9810000135	Latitude D410,IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	DELL COMPUTER INC	810000205	Express Receive
9810000133	3/4 115VDC 10 DIA DIV 1 BELL W/VIBRATING HAMMER	Multiple	Multiple	Express Receive
9810000113	Test for global blanket	SYNOPSIS INC	810000194	Express Receive
9810000111	Electrical service	JJM_SUPPLIER	810000190	Express Receive
9810000110	Electrical services	JJM_SUPPLIER	810000189	Express Receive

My Receipts at a Glance

Click **View Details** to view receipt details. [Full List](#)

Receipt	Item Description	Receipt Date	Transaction Date	Supplier	View Details
No data exists.					

Receiving Process

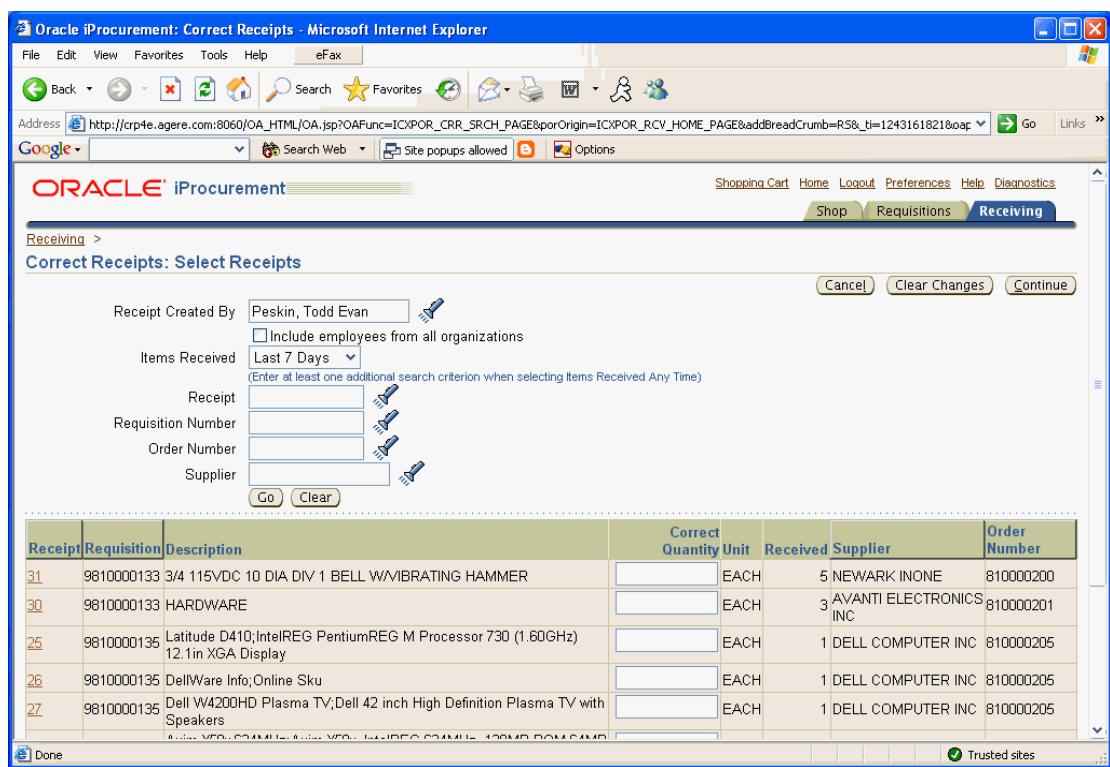
- Receive**
Record receipt of the items you ordered, or receive on behalf of others.
[Receive Items](#)
- Return**
Need to send items back to the supplier?
[Return Items](#)
- Correct**
Did you record the wrong receipt quantity?
[Correct Receipts](#)
- View**
View receipts with all associated returns and corrections.
[View Receipts](#)

1. Determine action to perform.

If correcting a receipt, goto task #2. Otherwise to return an item, goto task #9.

2. Click on the Correct Receipts link.

You can use the link at the top of the screen or in the Receiving Process section on the right hand side of the screen.

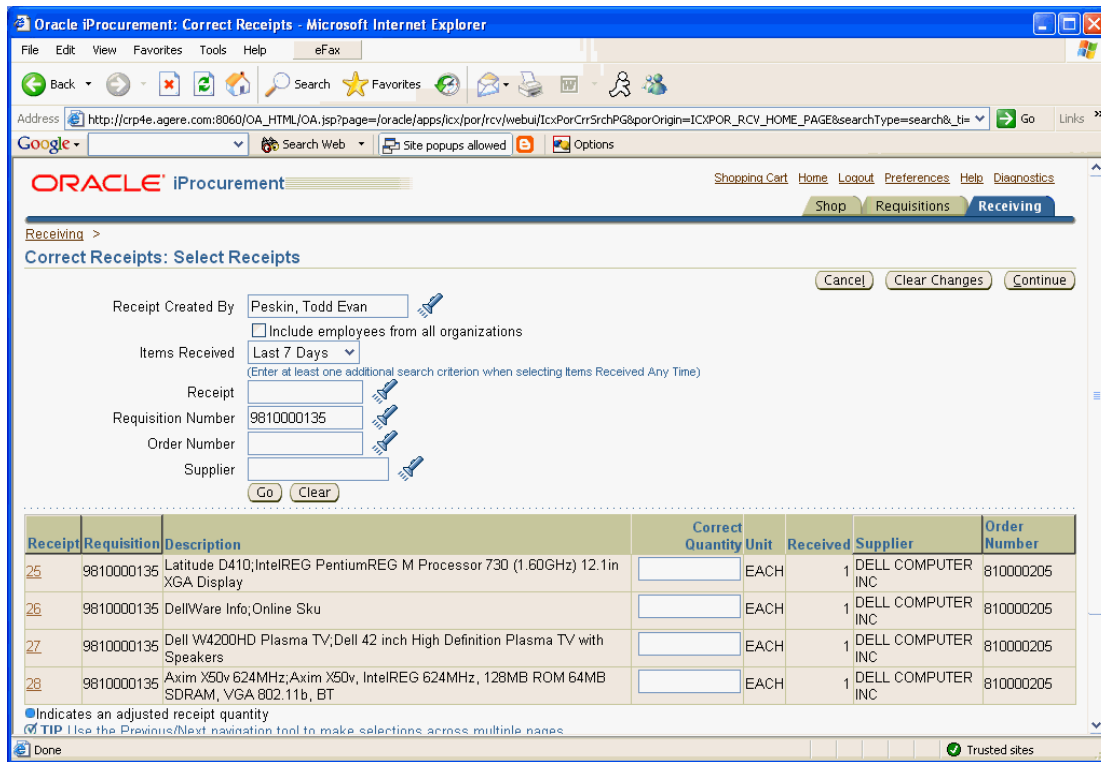


3. Enter the appropriate search criteria.

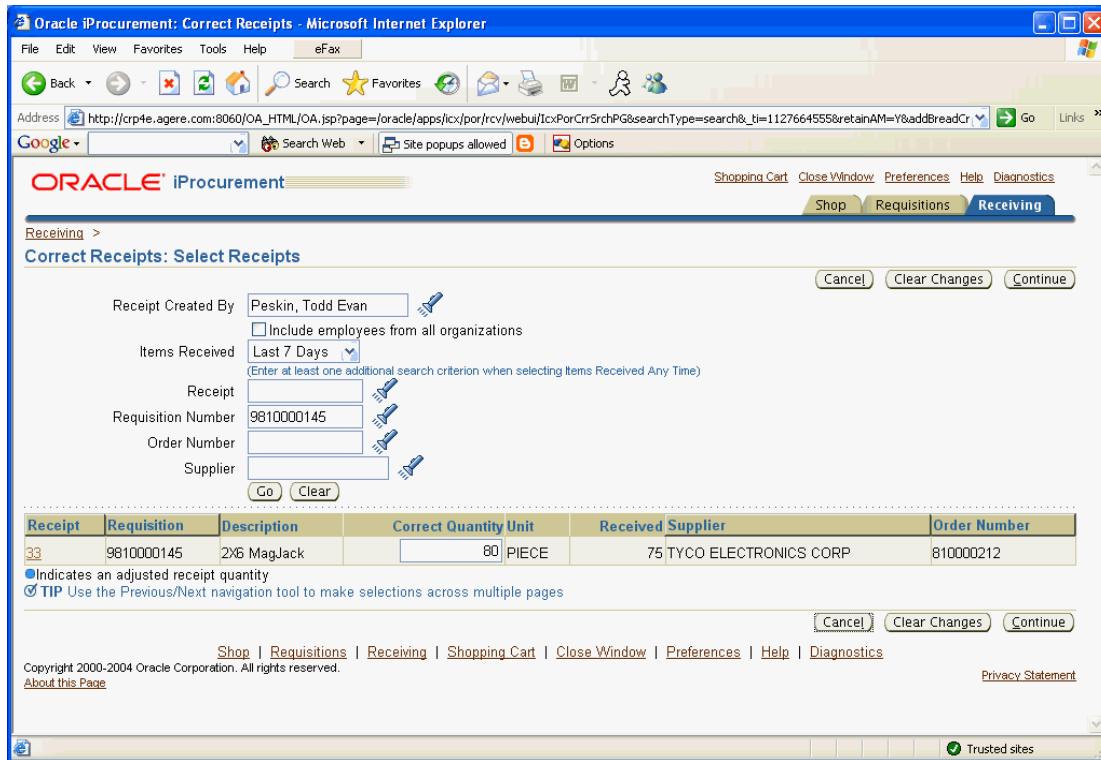
You can search for receipts created by other users by specifying the appropriate Receipt Created By.

Perform search by using the receipt date, Receipt number, Requisition Number, Order Number (Purchase Order number), or Supplier.

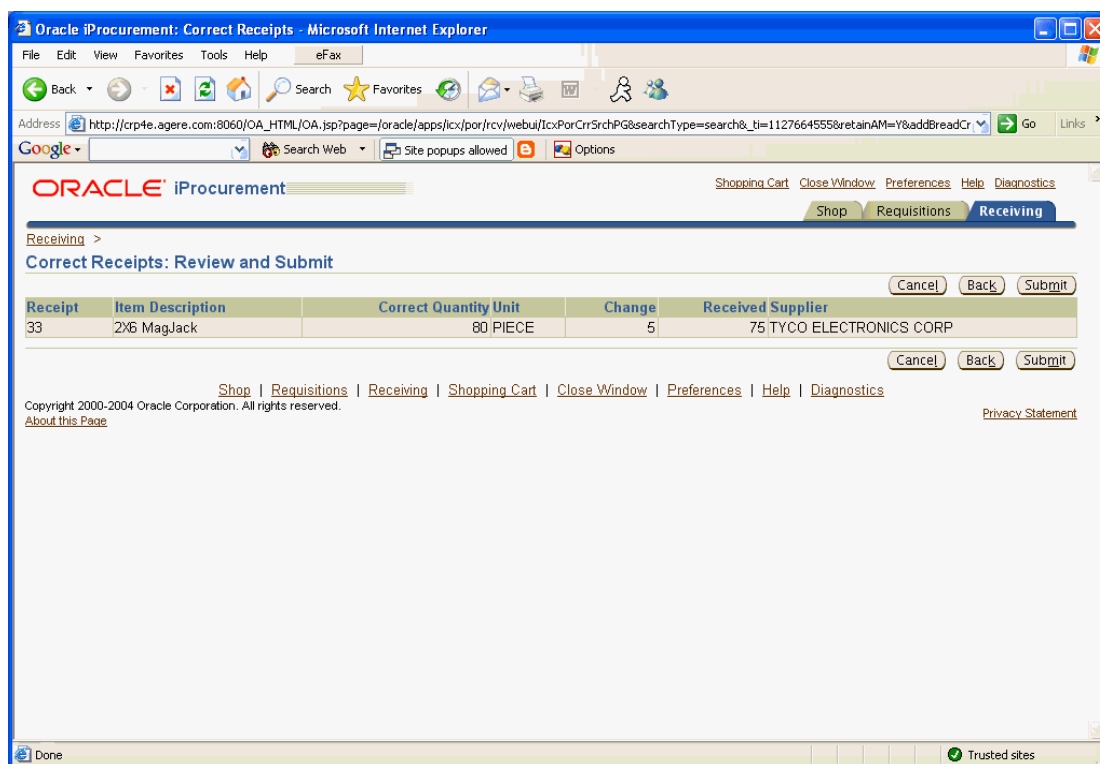
4. Click (B) Go.



5. Enter the correct quantity.



6. Click (B) Continue.



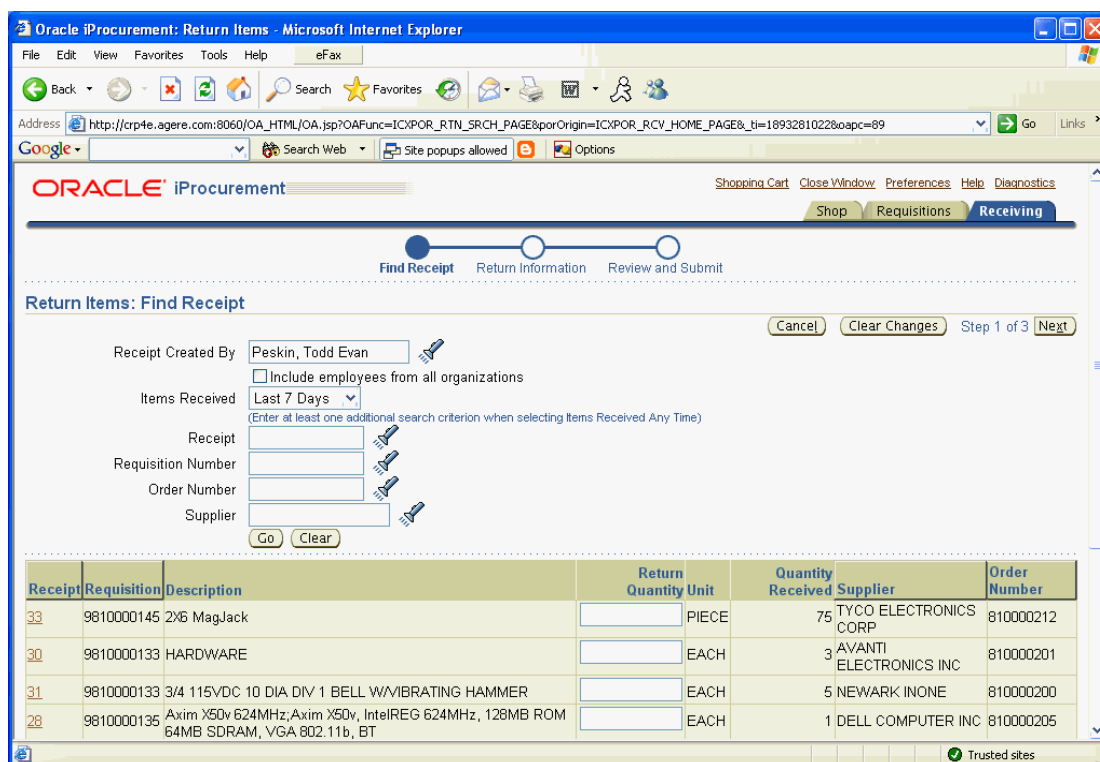
7. Review the changes.
8. Click (B) Submit.

End of activity.

9. Click on the Return Items link.

You can use the link at the top of the screen or in the Receiving Process section on the right hand side of the screen.

If there are physical goods to be returned to a Supplier, please ensure that you follow all location specific procedures (e.g. contact Buyer for RMA #, take material to receiving dock, etc.) related to material returns.

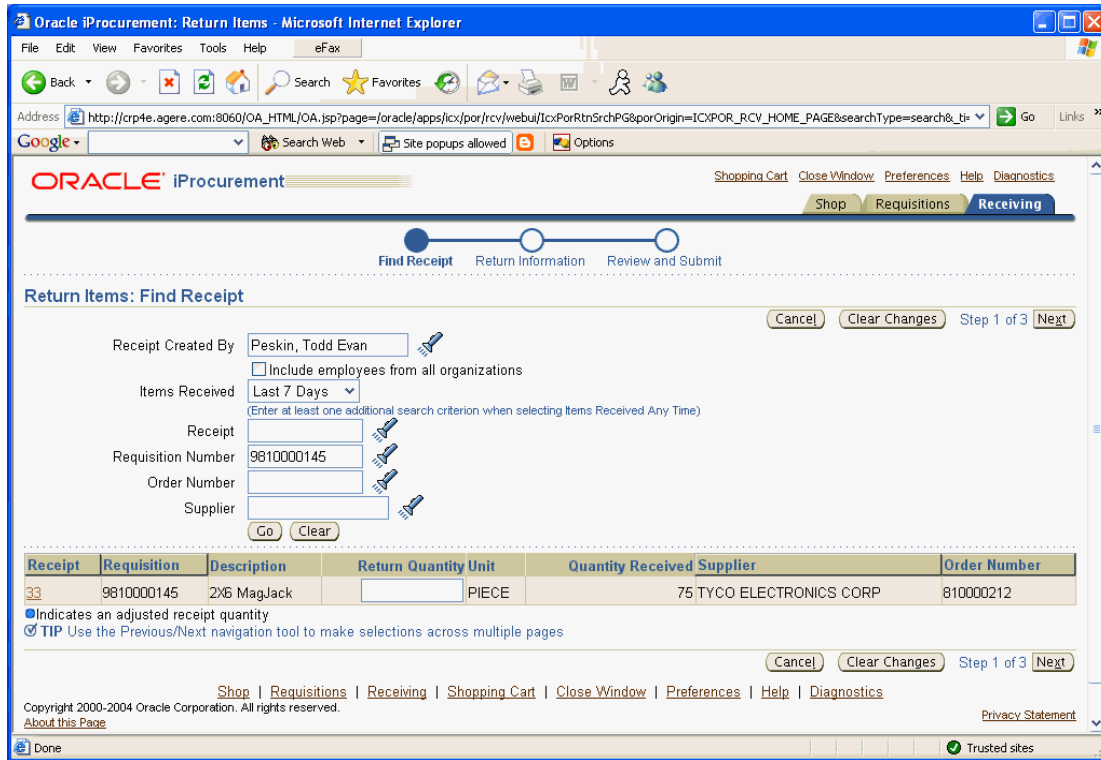


10. Enter the appropriate search criteria.

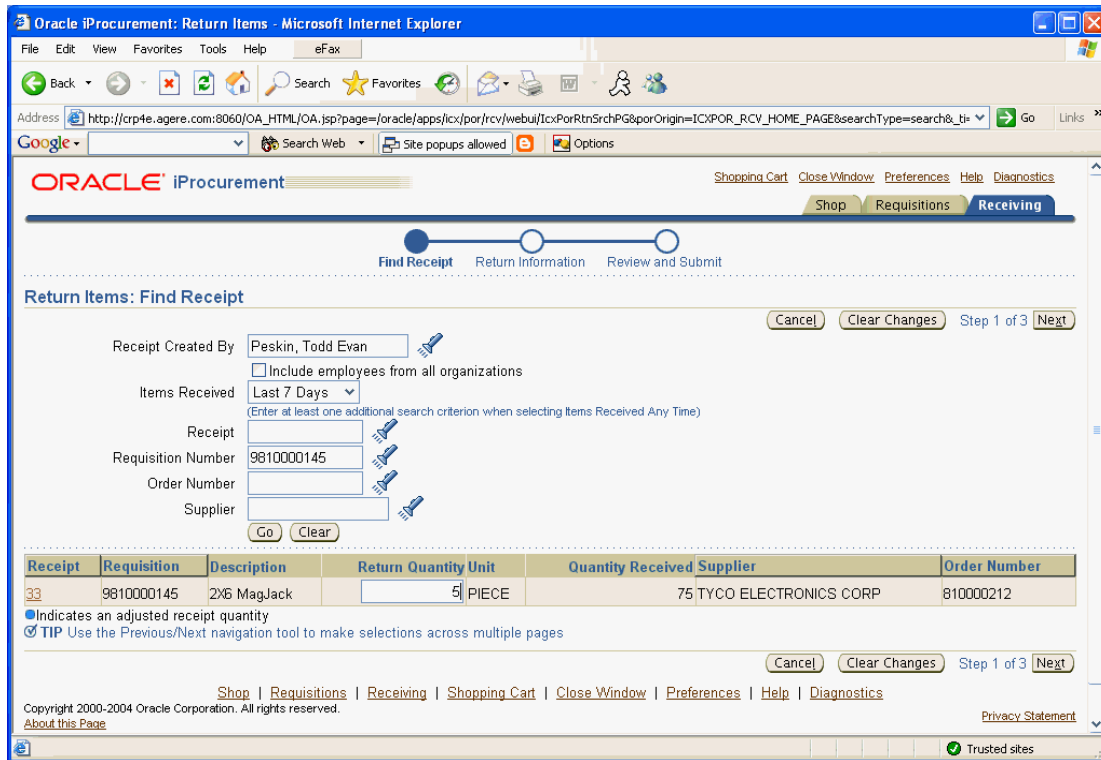
You can search for receipts created by other users by specifying the appropriate Receipt Created By.

Perform search by using the receipt date, Receipt number, Requisition Number, Order Number (Purchase Order number), or Supplier.

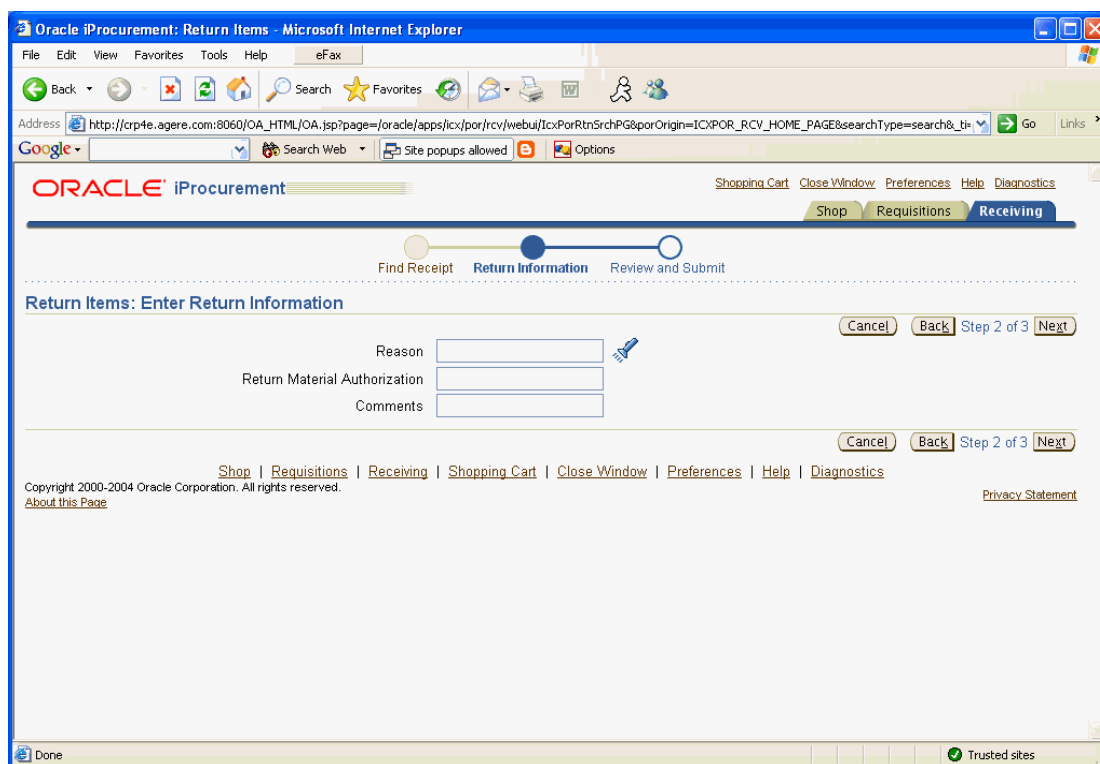
11. Click (B) Go.



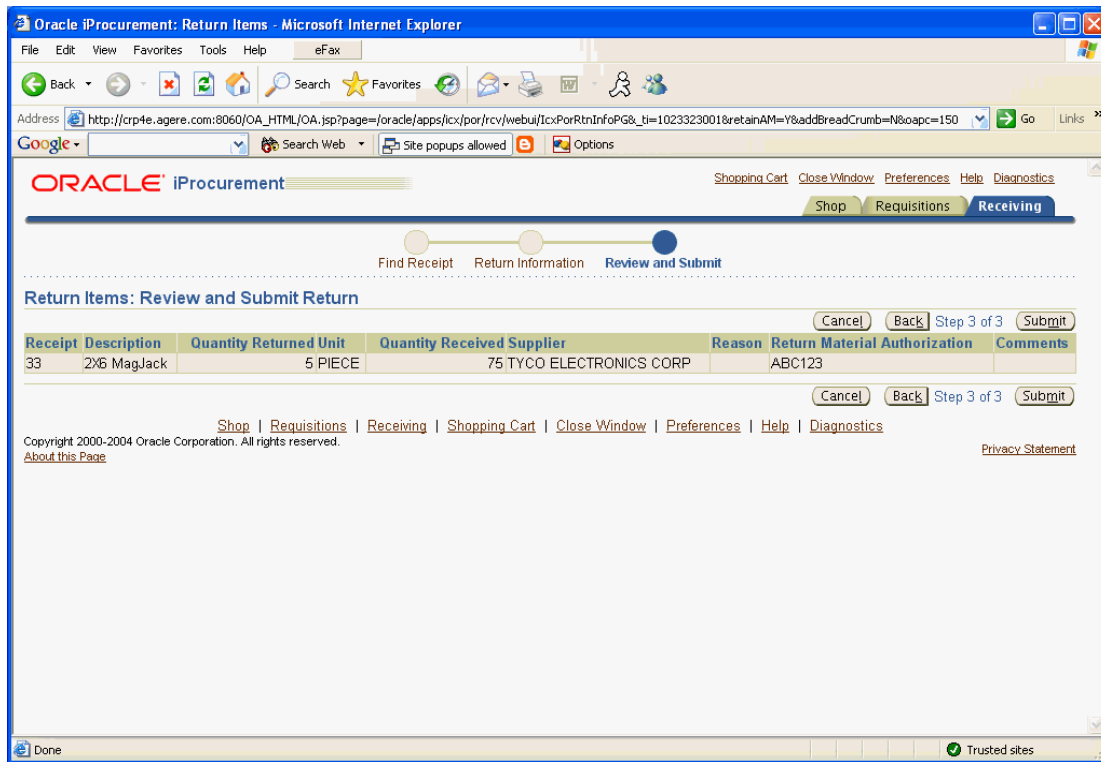
12. Enter the quantity to return.



13. Click (B) Next.

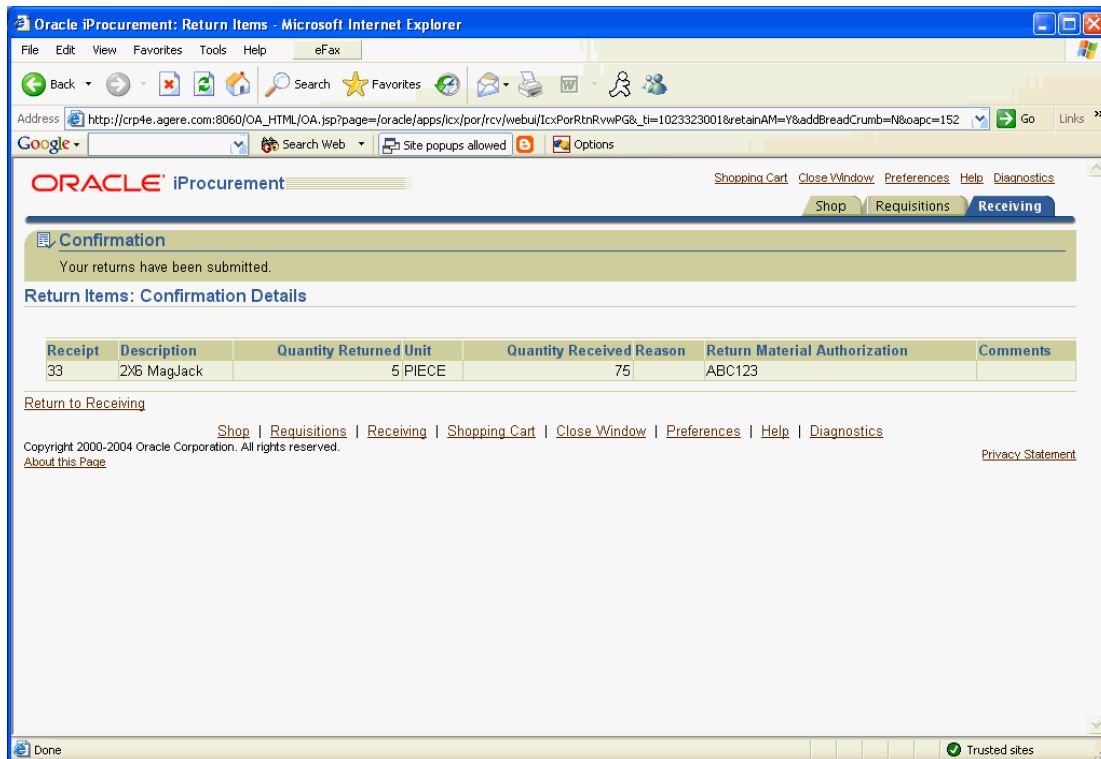


14. Specify the details for the return.
15. Select a Reason by clicking on (I) Flashlight.
16. Enter a Return Material Authorization (RMA) number if appropriate.
17. Enter comments if desired.
18. Click (B) Next.



19. Review the return information.

20. Click (B) Submit.



21. Notify the appropriate personnel of the return and take the item to the proper location so that it can be shipped back to the supplier.

End of activity.

Additional iProcurement Information

View Status or Control an iProcurement Requisition

iProcurement

N > iProcurement > (ST) Shop

Stores

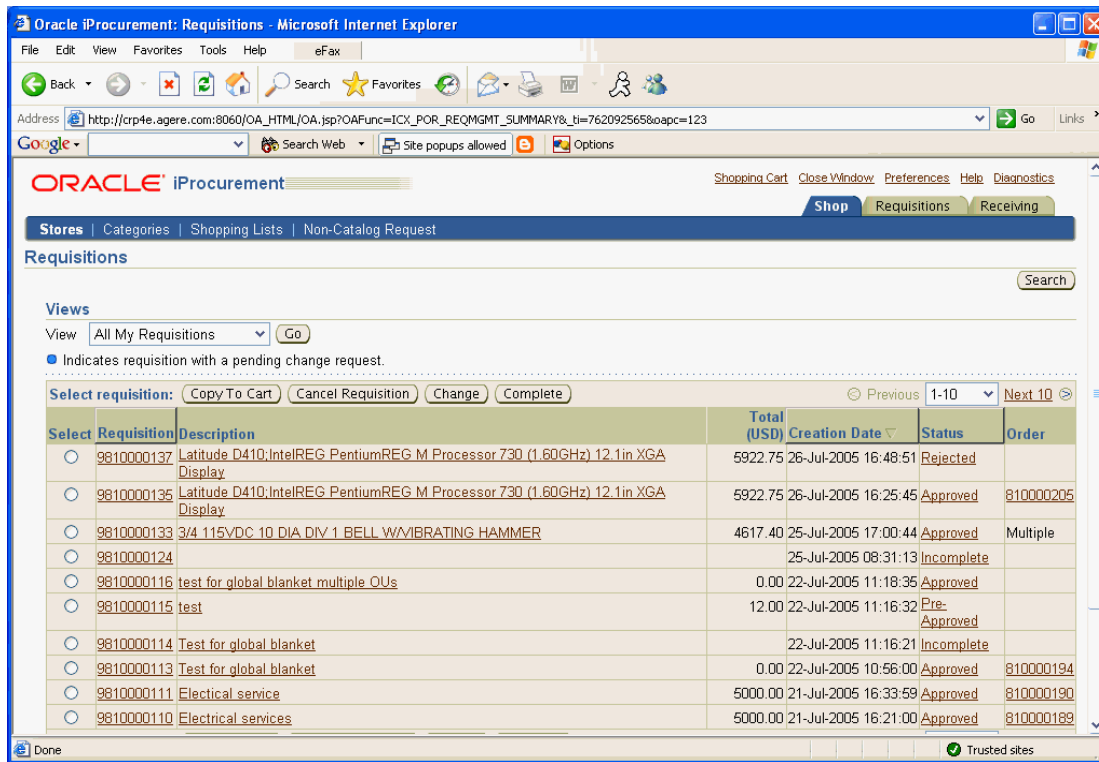
The screenshot shows the Oracle iProcurement Shop interface in Microsoft Internet Explorer. The browser address bar displays the URL: http://crp4e.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/ics/catalog/shopping/webui/ShoppingHomePG&_N=762092565&oaapc=122&OAMC=77414_84_08mei. The page features a navigation menu with tabs for 'Shop', 'Requisitions', and 'Receiving'. Below the navigation, there is a search bar with a dropdown menu set to 'Main Store' and a 'Go' button. A 'Shopping Cart' box on the right indicates 'Your cart is empty.' The 'Stores' section displays logos for 'Main Store', 'CDW', 'DELL', 'NEWARK in one', 'Newark InOne', and 'SHI Software House International'. The 'My Requisitions' section is highlighted, showing a table with columns for Requisition, Description, Total (USD), Status, Copy, Change, and Express Receive. A 'Full List' button is located to the right of the table.

Requisition	Description	Total (USD)	Status	Copy	Change	Express Receive
9810000137	Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	5922.75	Rejected			
9810000135	Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	5922.75	Approved			
9810000133	3/4 115VDC 10 DIA DIV 1 BELL W/MBRATING HAMMER	4617.40	Approved			
9810000124			Incomplete			
9810000116	test for global blanket multiple OUs	0.00	Approved			

1. View the My Requisitions section of the home page.

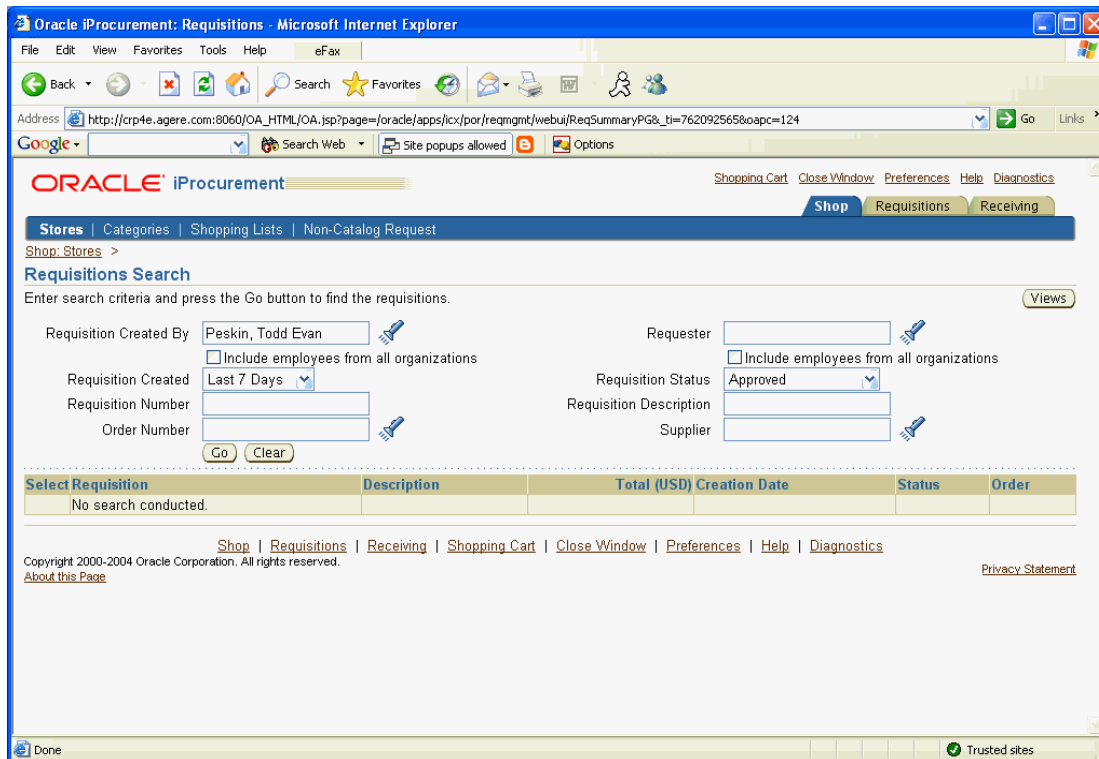
If the requisition is listed, goto task #6. Otherwise, goto task #2.

2. Click (B) Full List.



If the requisition is missing from listed, goto task #3. Otherwise, goto task #6.

3. Click (B) Search.



4. Specify the appropriate search criteria.

You can enter an alternate requestor or preparer (Requisition Created By) if desired.

The creation date window can be entered.

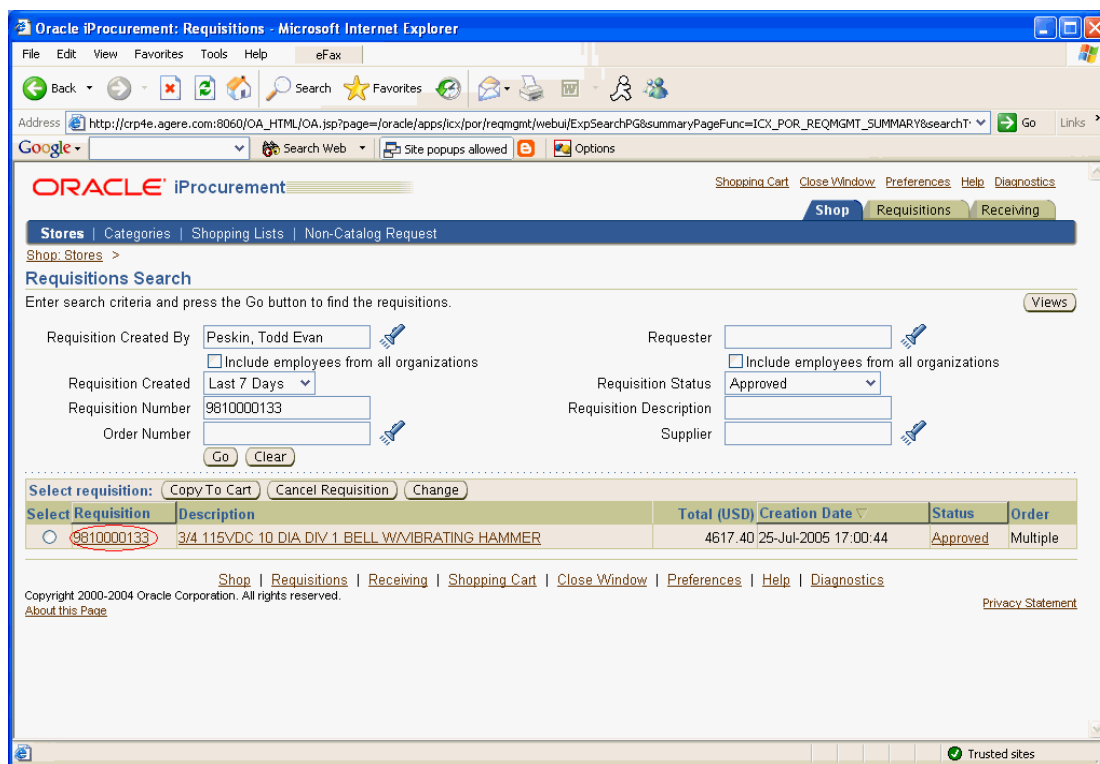
A search can be performed using an exact Requisition Number or Order Number (PO Number).

The Requisition Status can be specified.

A search can be performed using all or part of the requisition description. The '%' wildcard can be used.

The search can be performed on the Supplier as well.

5. Click (B) Go.



6. Click on the appropriate Requisition link.

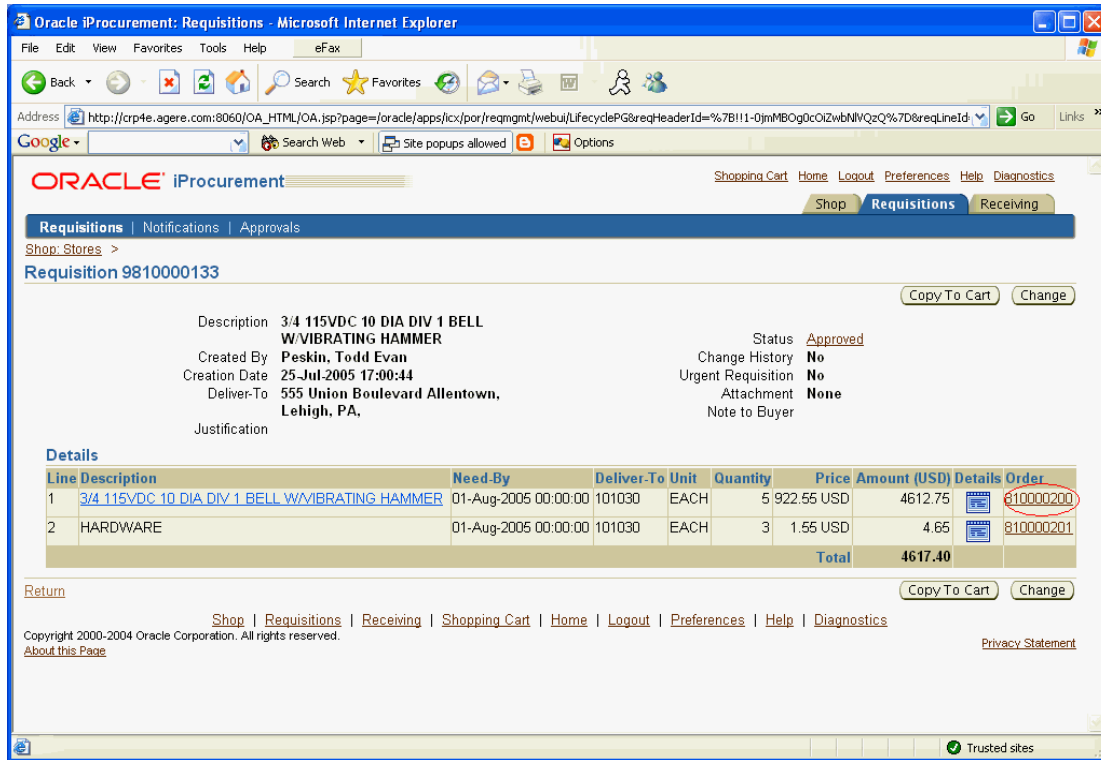
Requisition detail - PO, Receipt, Invoice, Payment

If viewing the requisition details, goto task #7.

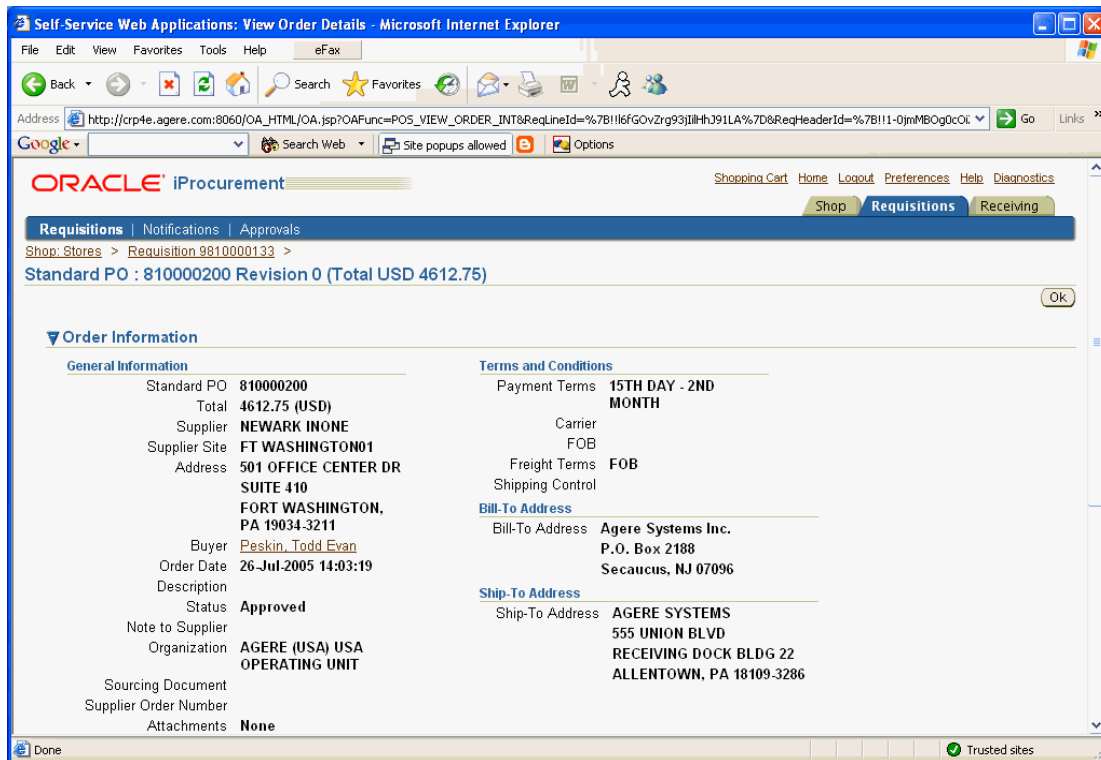
If copying the requisition to your shopping cart, goto task #16.

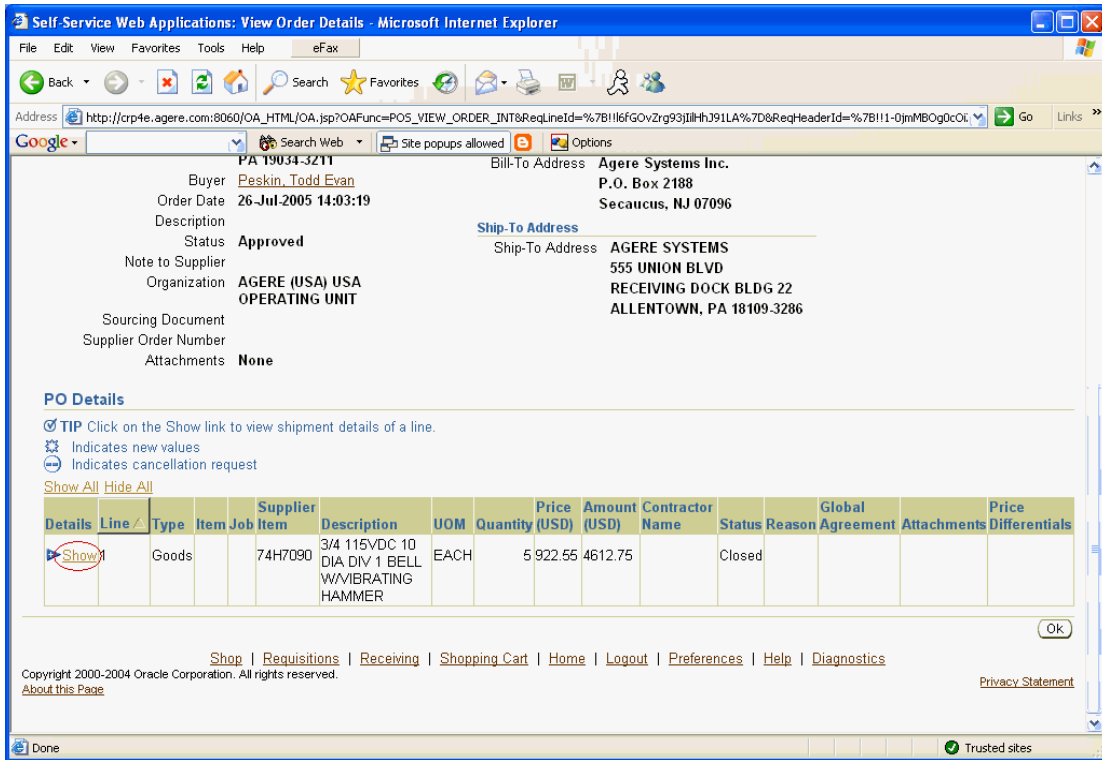
If canceling one or more requisition lines, goto task #18.

If changing requisition, goto task #25.

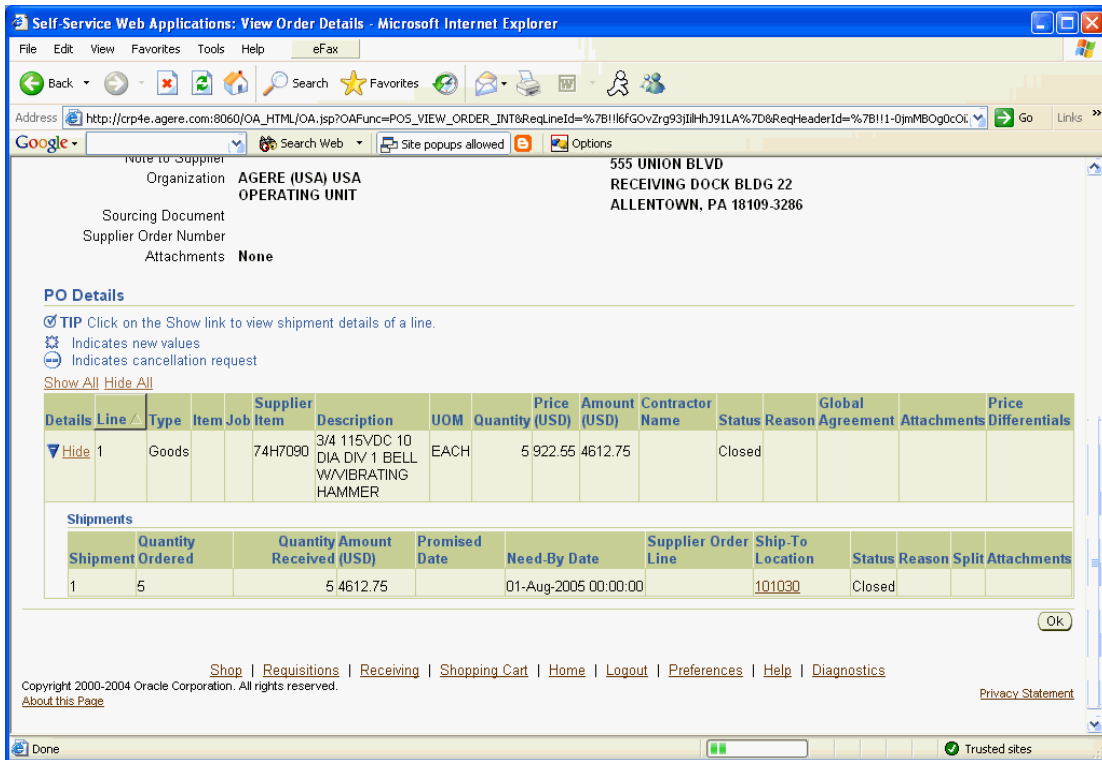


- Click on the Order number link to view the purchase order associated with the requisition line.

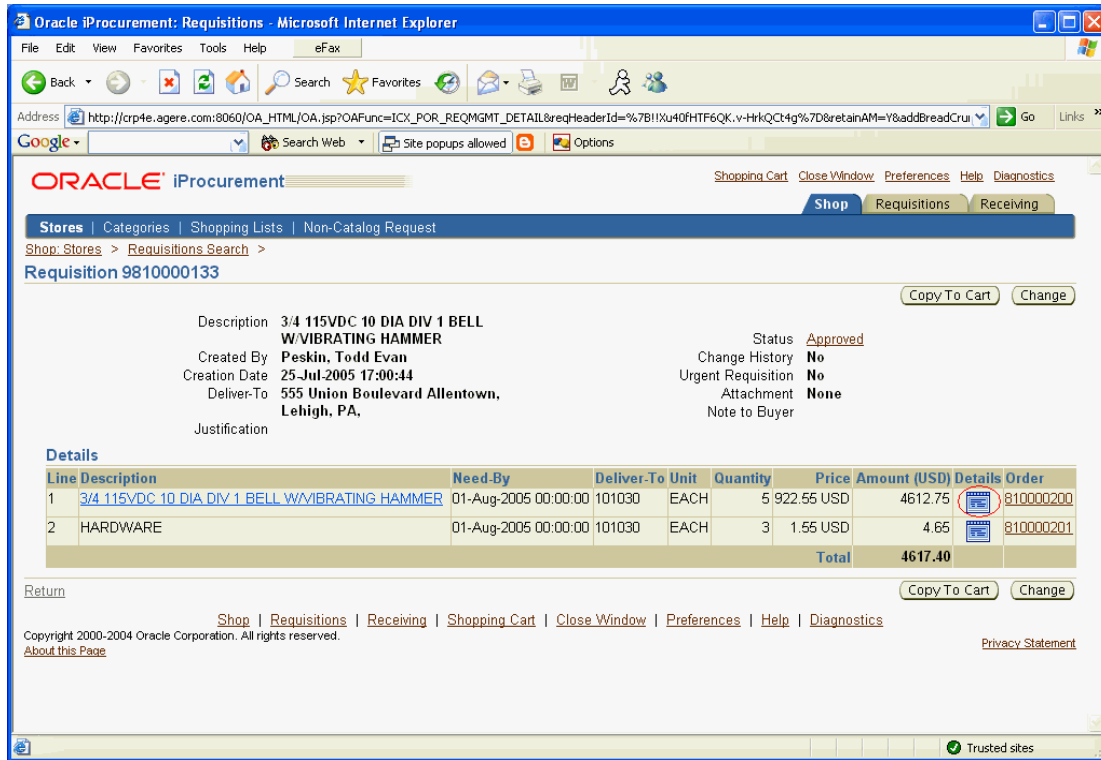




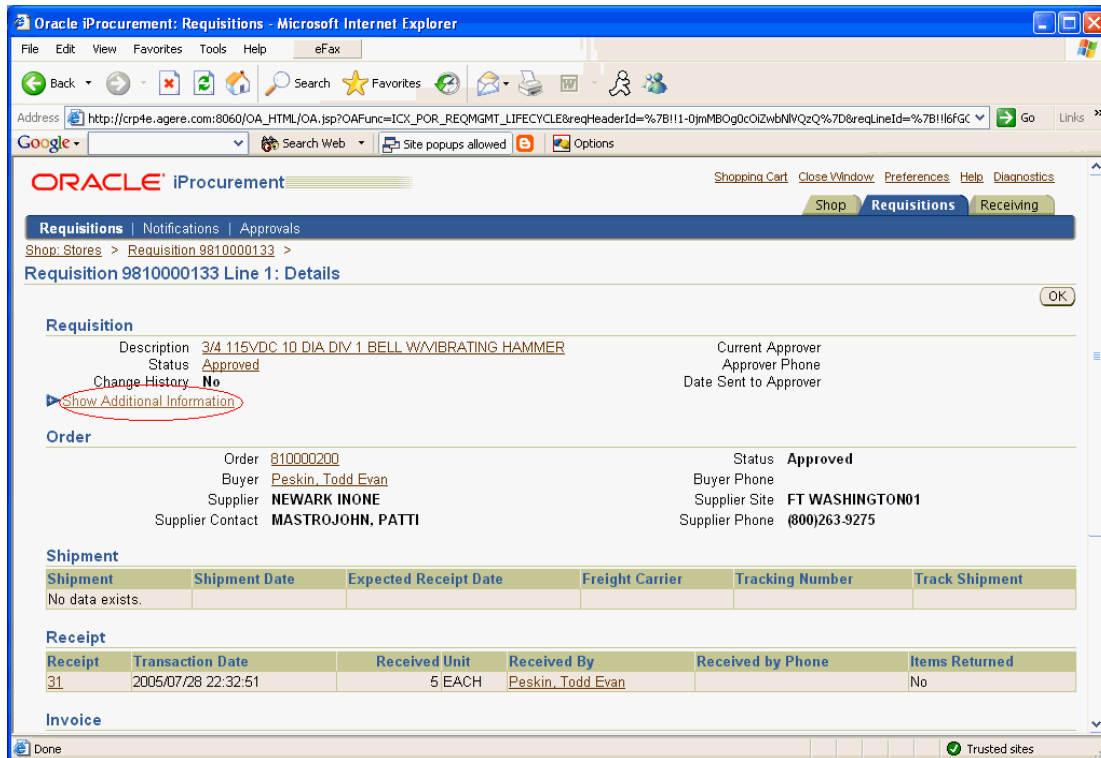
8. Click on the Show link to view the details of the Purchase Order line.

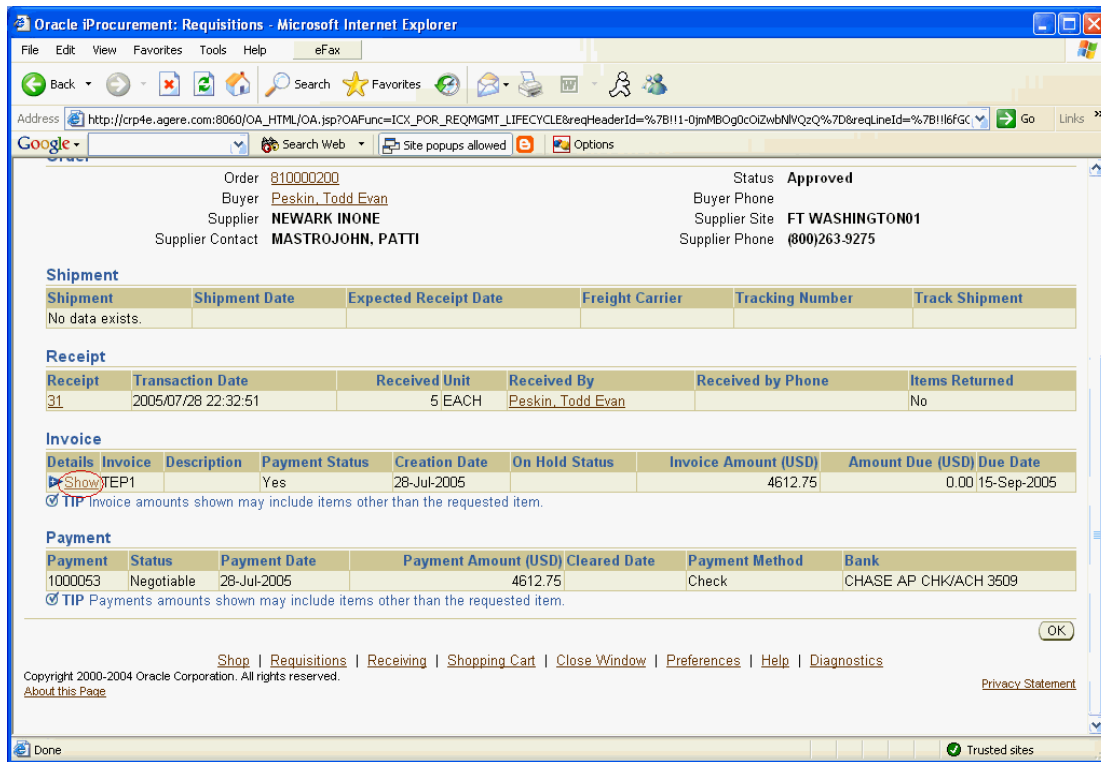


9. Click (B) Ok.

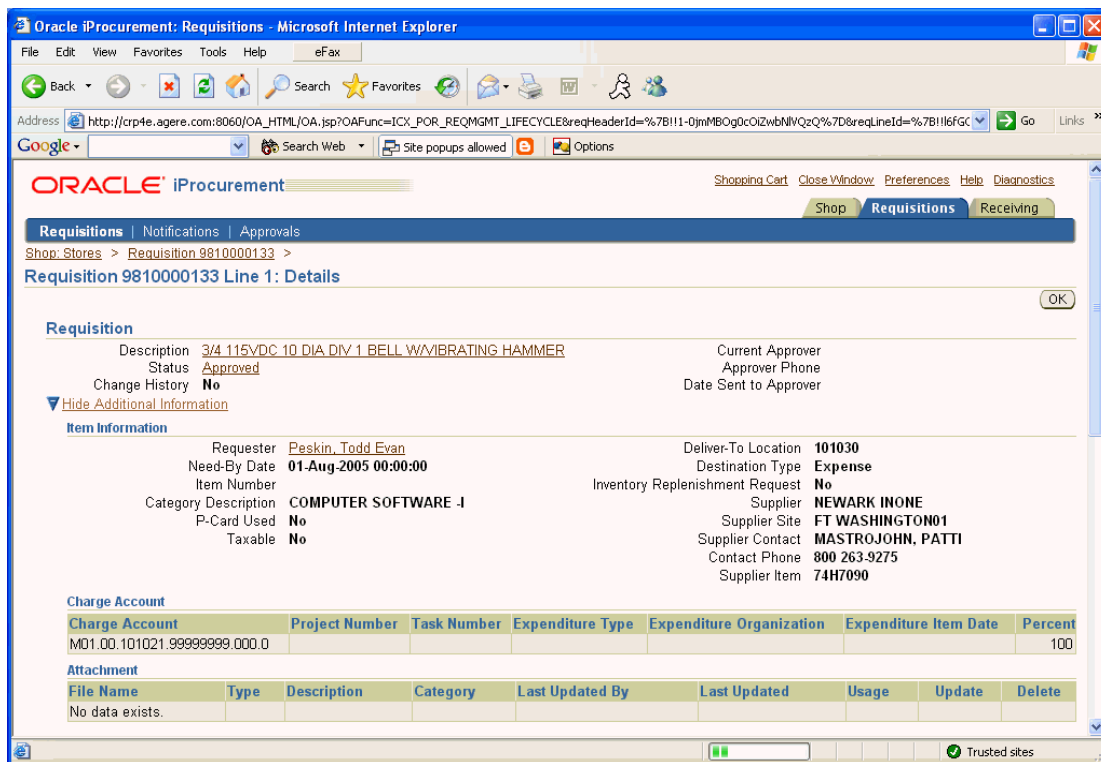


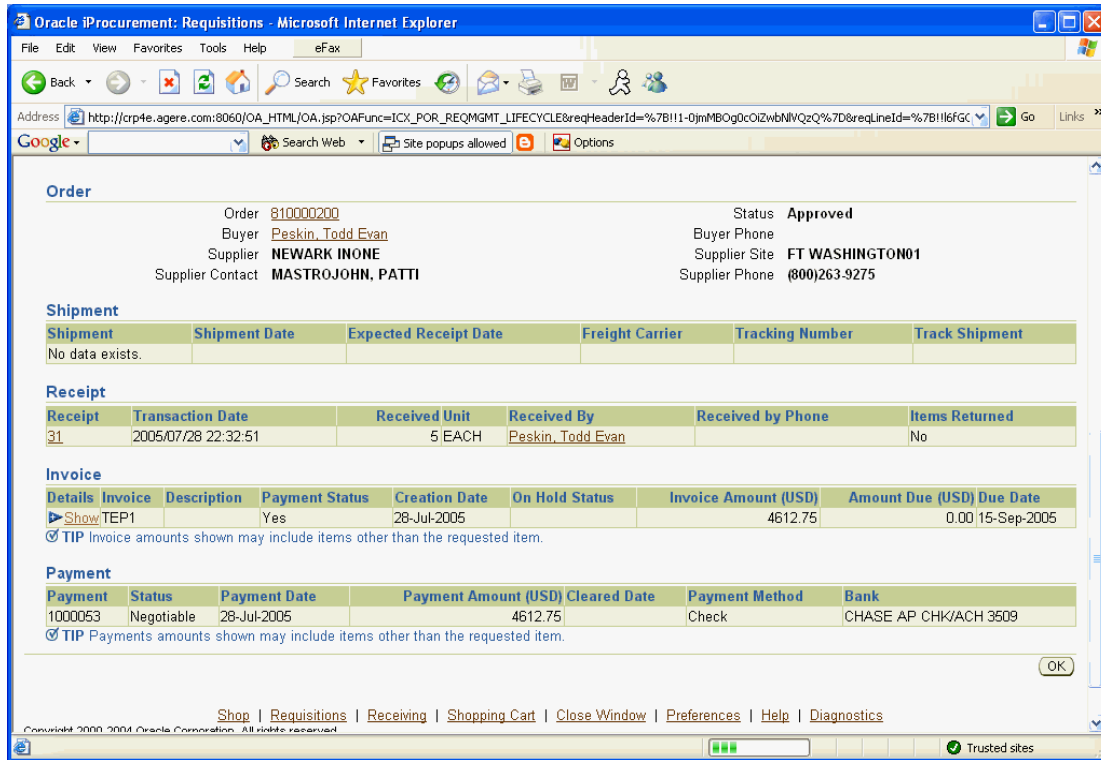
10. Click on (I) Details to view the details of a specific line.



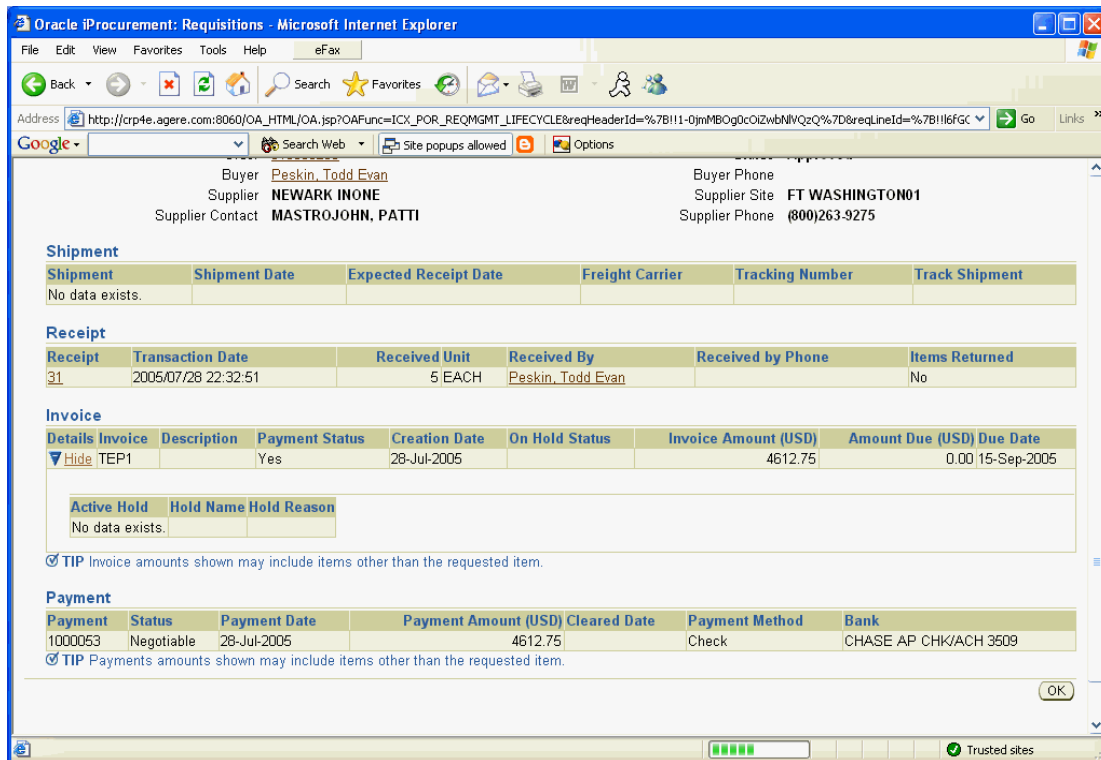


- Click the Show Additional Information link to view more details for the line including the charge account information.





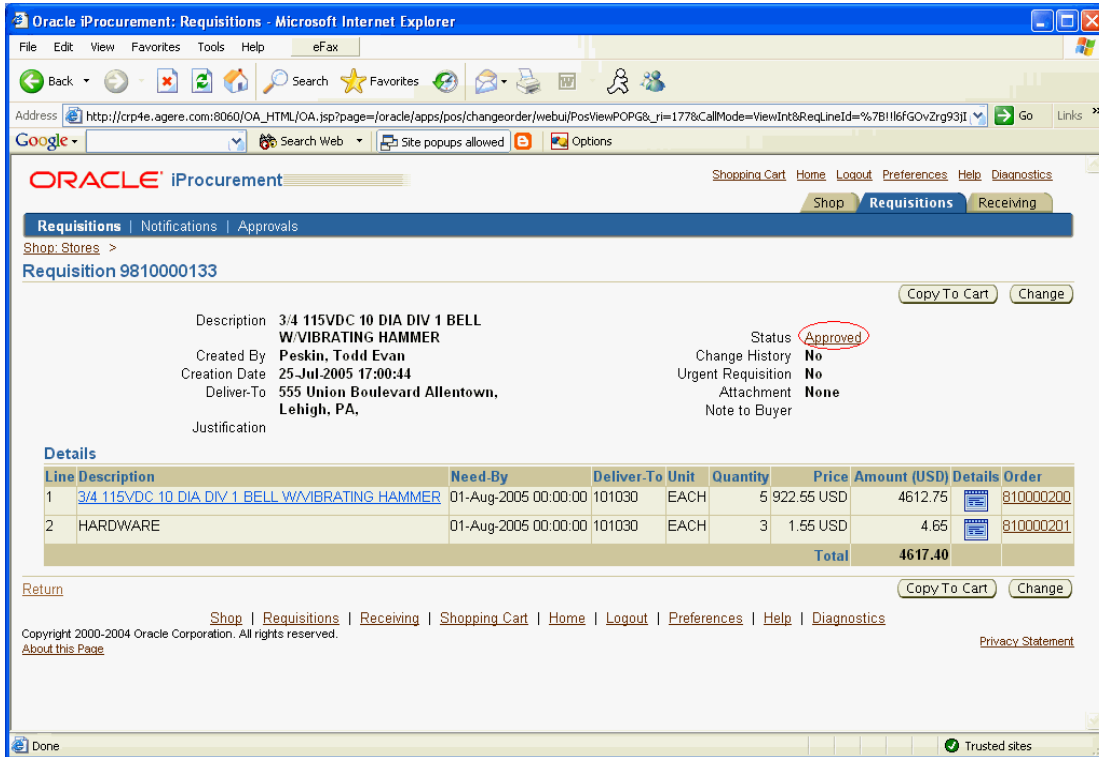
- Click the Show link in the Invoice Details column to view additional invoice information including invoice holds.



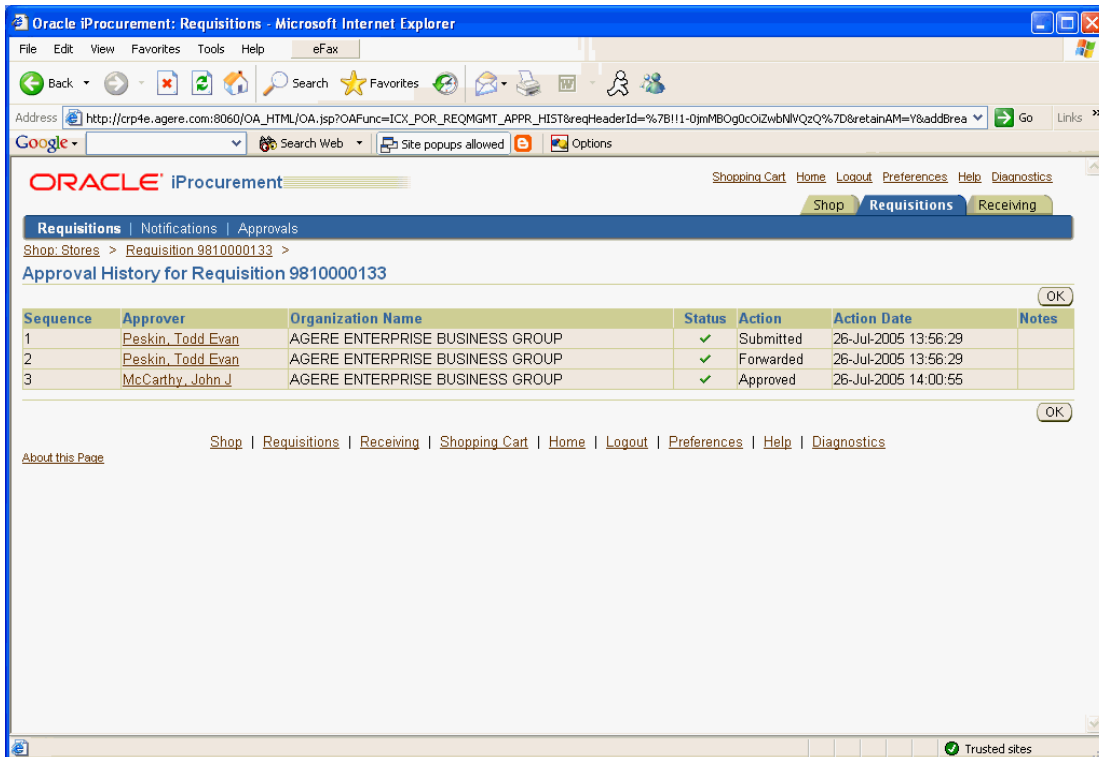
Any underlined link can be clicked to provide additional details.

This includes the Order Number and Receipt number.

13. Click (B) Ok.



14. Click on the status link for information on the approval history of the requisition.



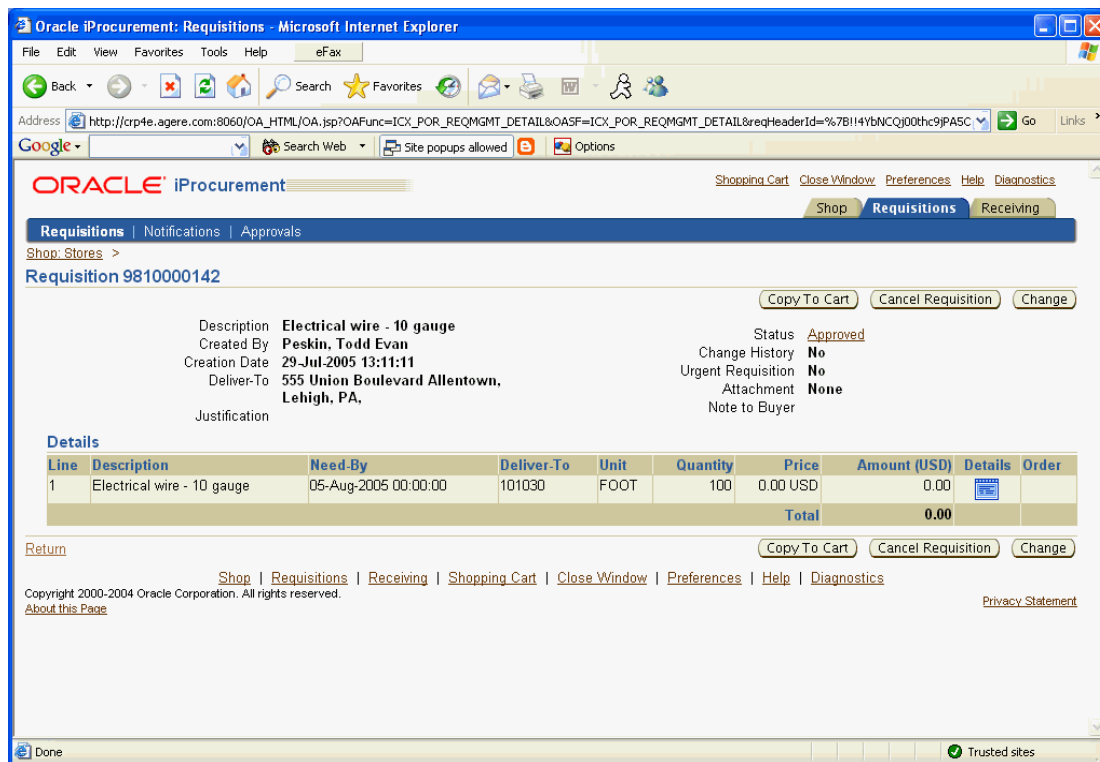
15. Click (B) Ok.

If copying the requisition to your shopping cart, goto task #16.

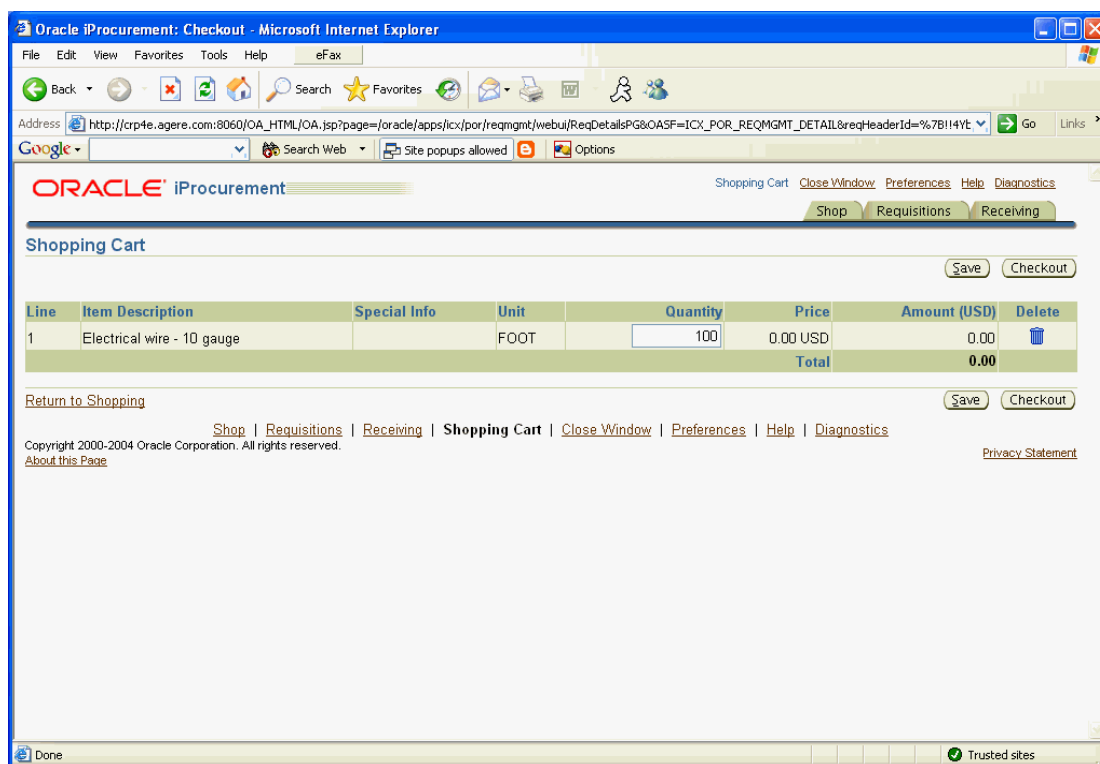
If canceling one or more requisition lines, goto task #18.

If changing the requisition, goto task #25.

If none of the above, goto End of Activity.



16. Click (B) Copy To Cart.



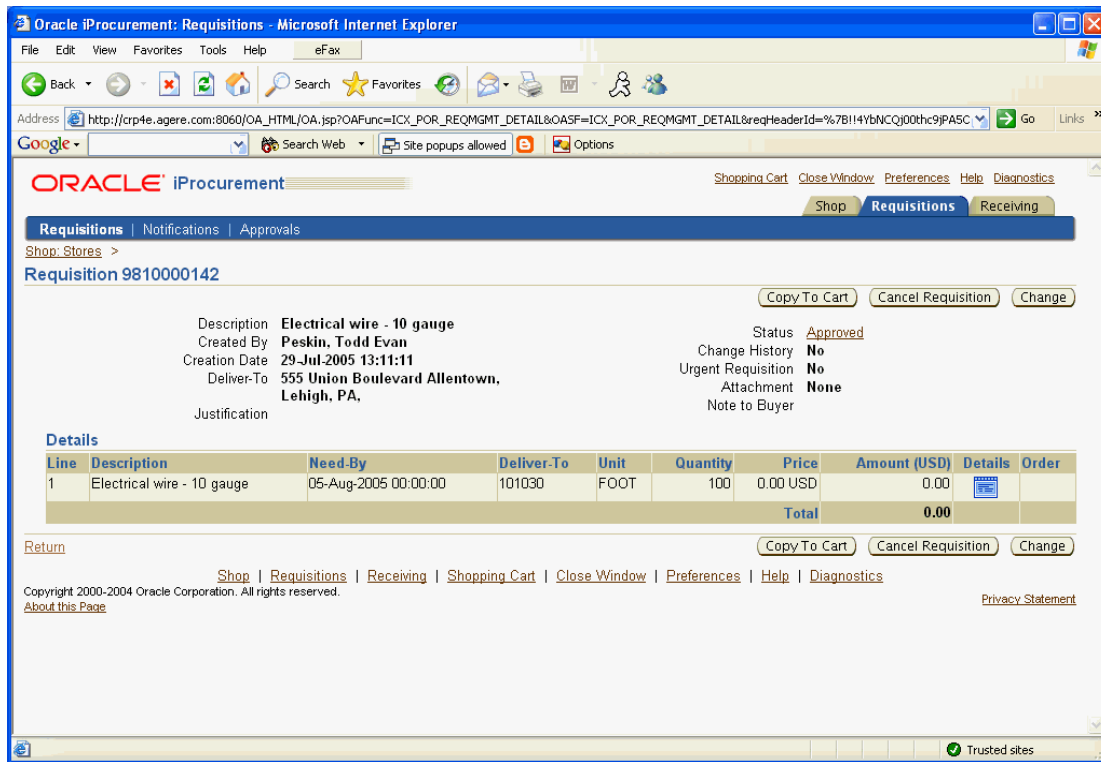
The requisition lines will be copied to the current shopping cart.

DO NOT use this method to reorder catalog or punchout items because the latest prices may not be reflected on the new purchase order.

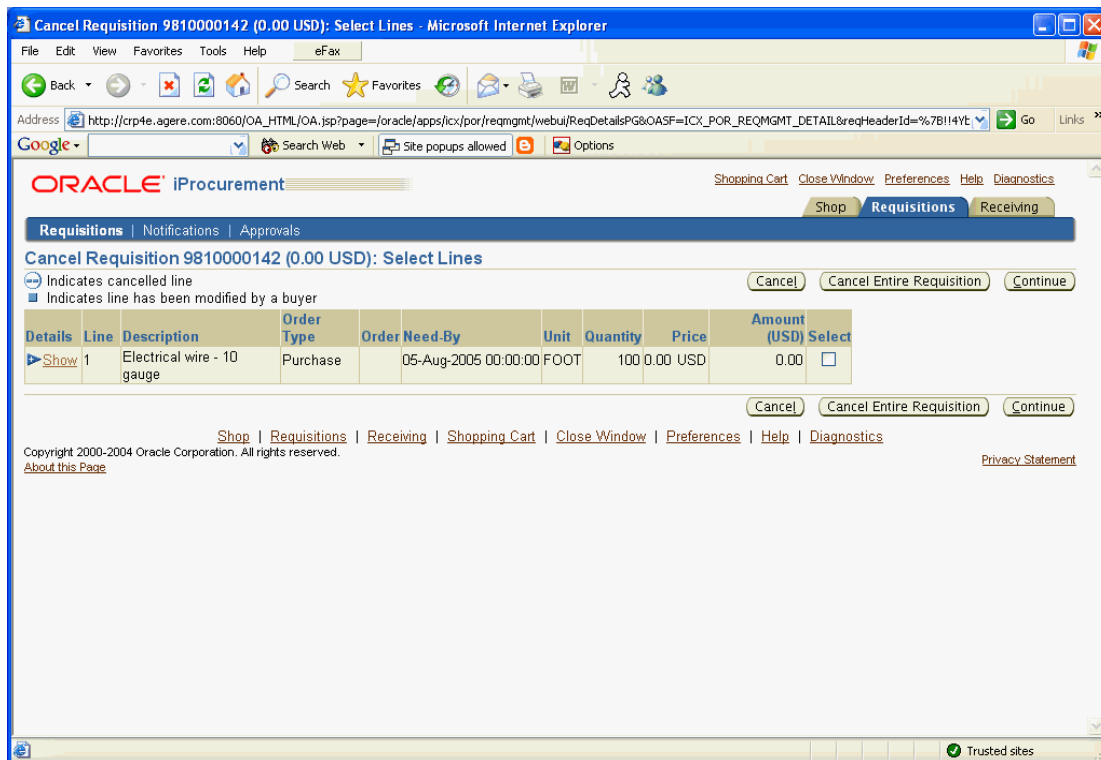
17. Complete the requisition.

Additional information [Checkout and Complete an iProcurement Requisition \[../FND/@NAP2P205\]](#).

End of activity.

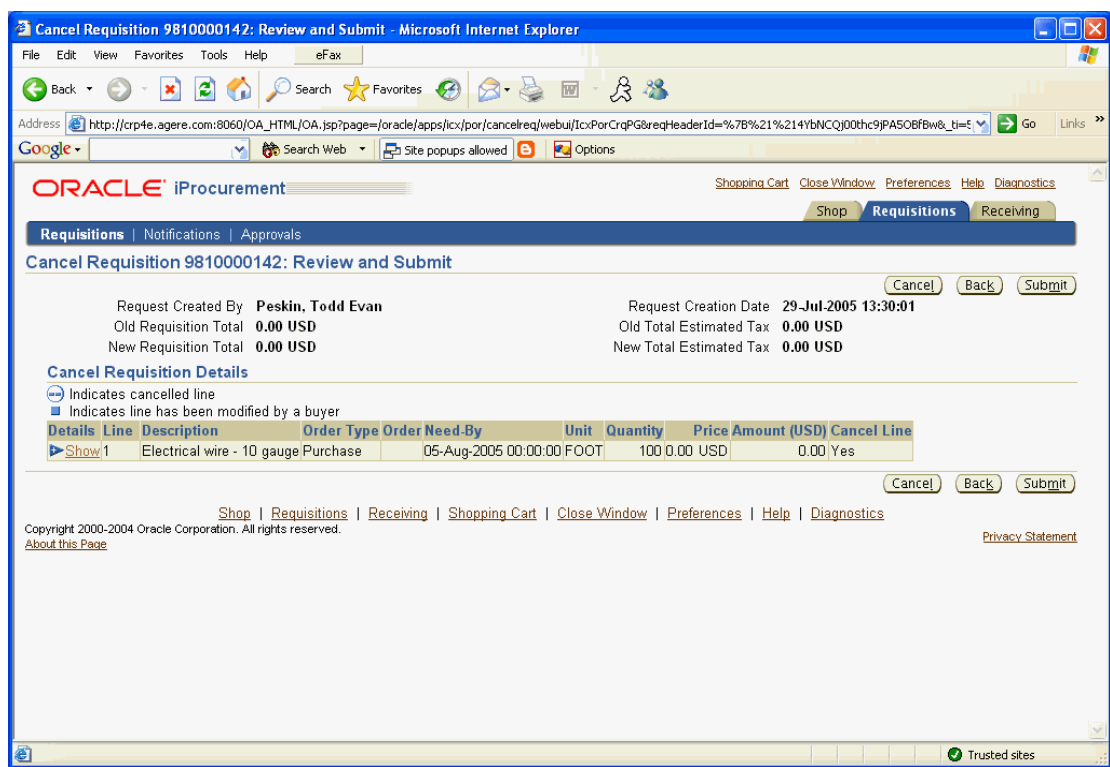


18. Click (B) Cancel Requisition.



If canceling the entire requisition, goto task #19. Otherwise, goto task #22.

19. Click (B) Cancel Entire Requisition.

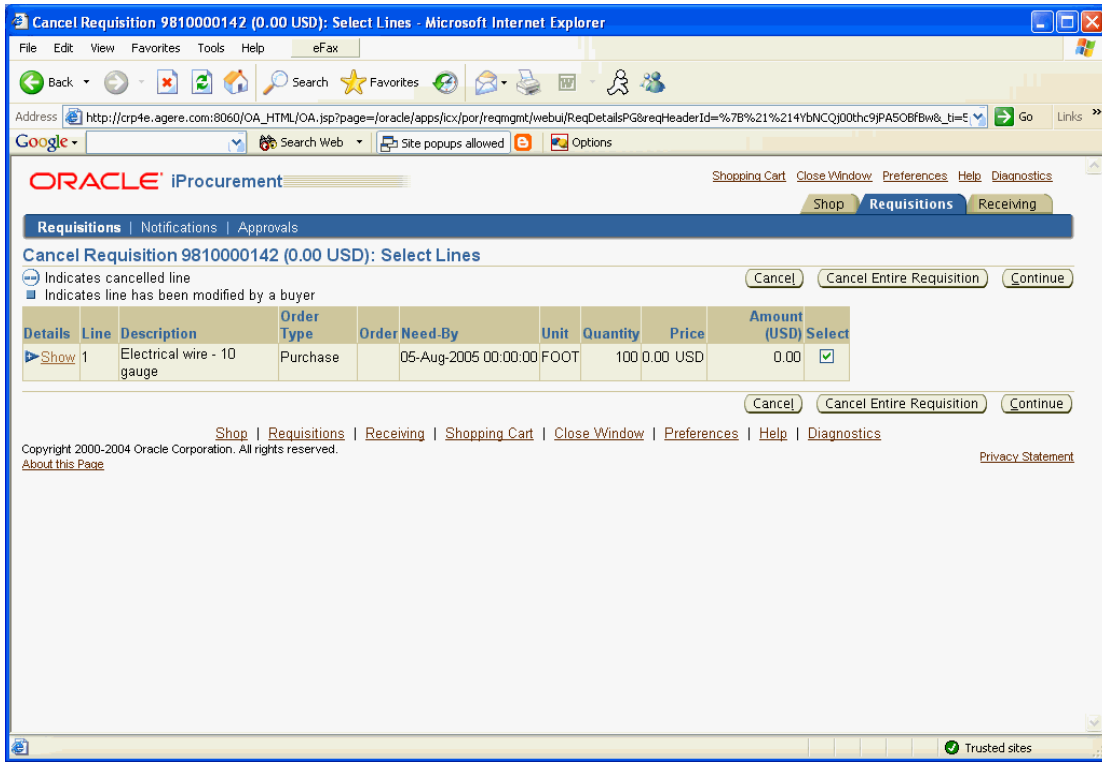


20. Review the screen to verify that this is the correct requisition to be cancelled.

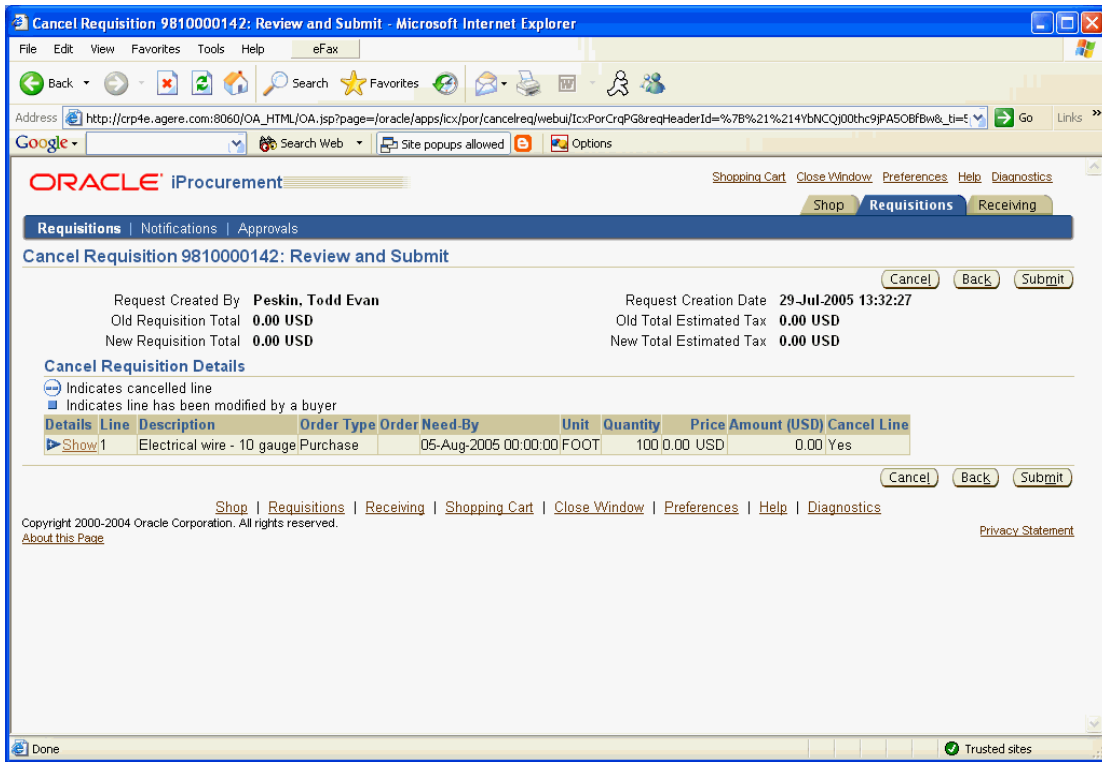
21. Click (B) Submit.

End of activity.

22. Select the appropriate line or lines.

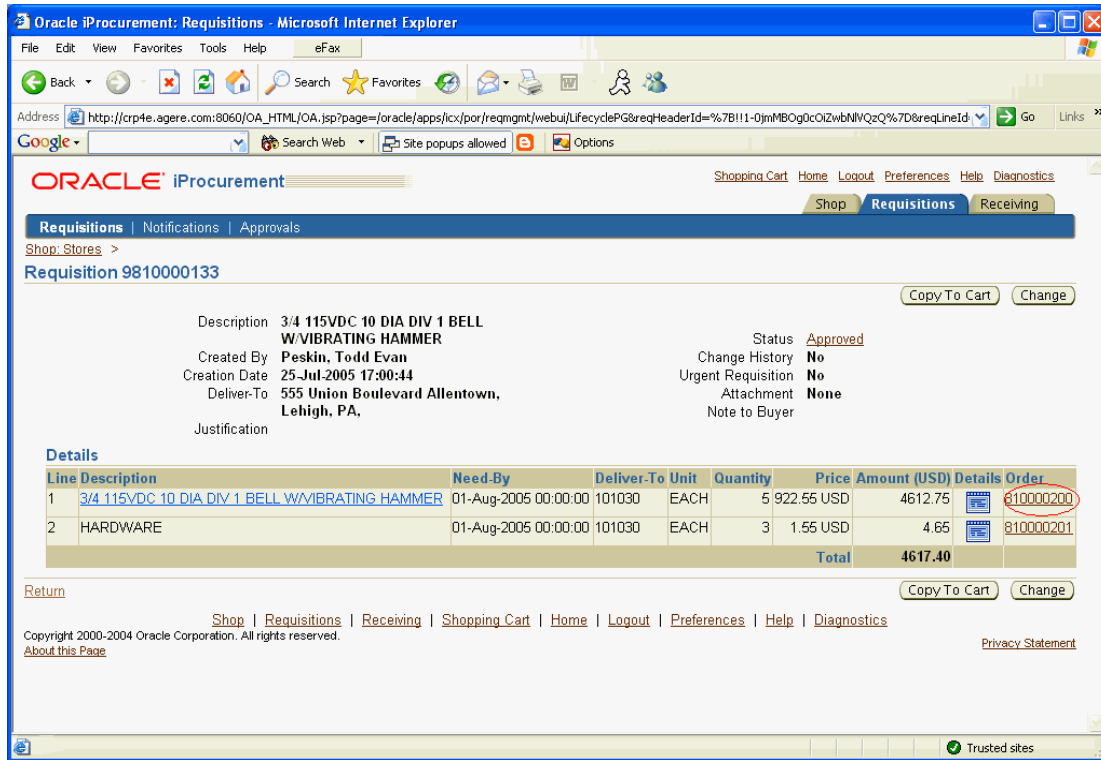


23. Click (B) Continue.

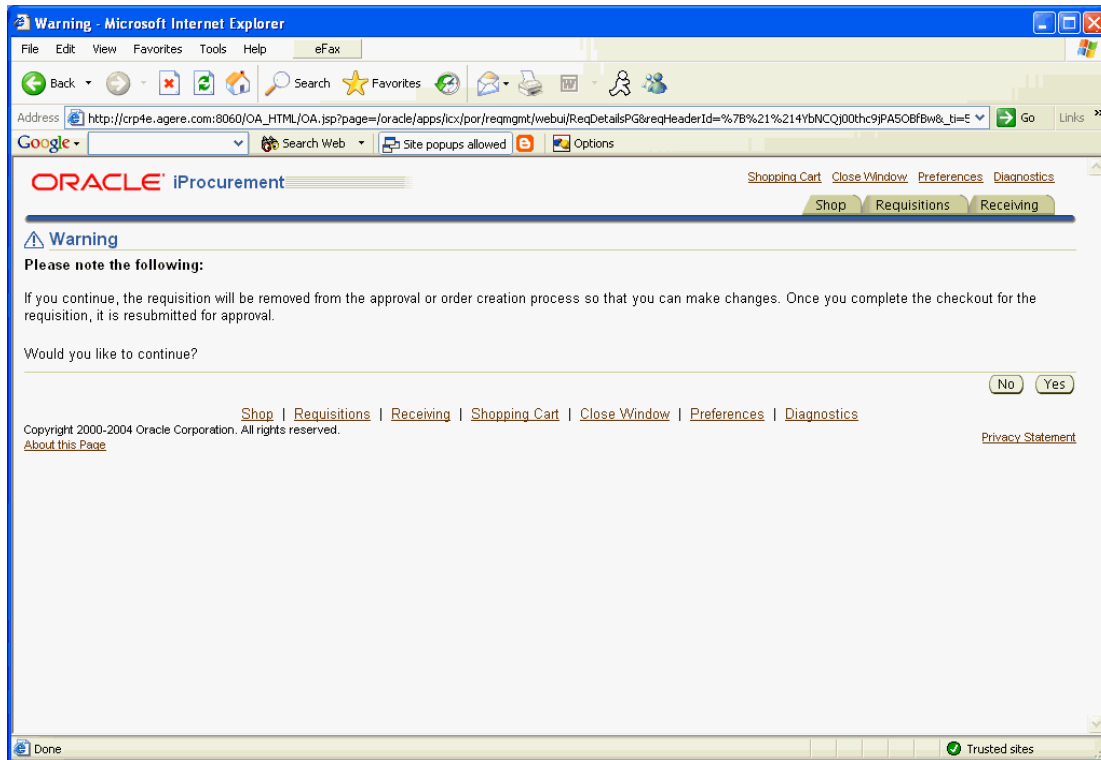


24. Click (B) Submit.

End of activity.

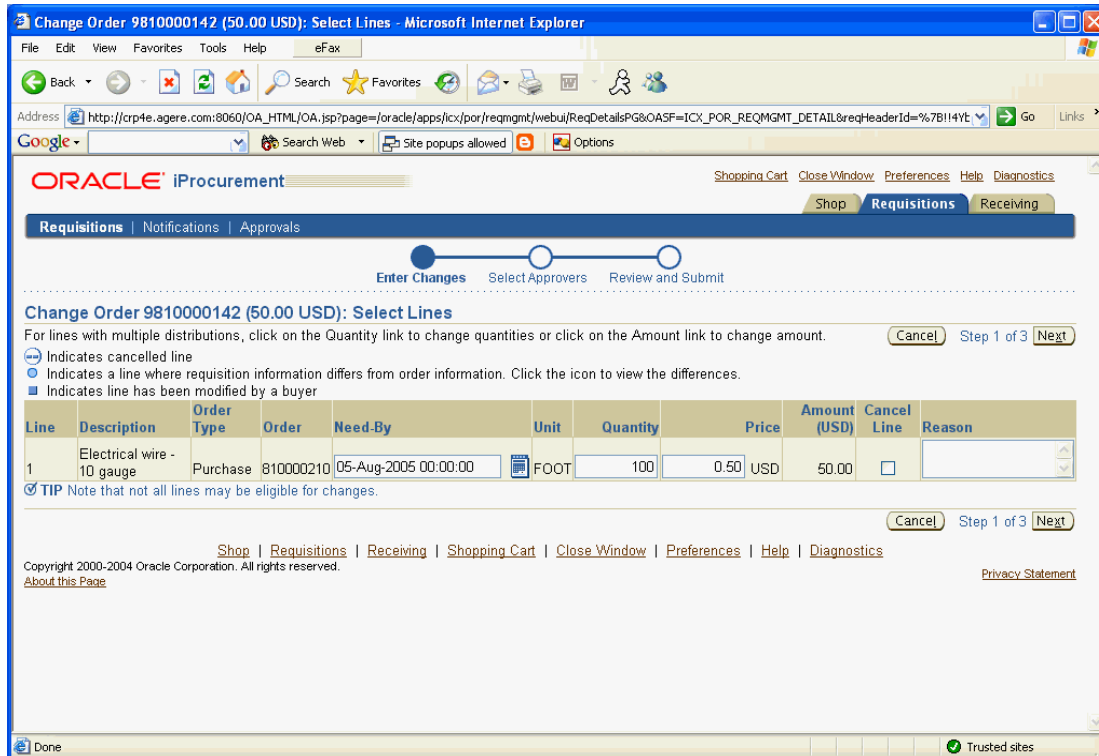


25. Click (B) Change.



26. Click (B) Yes.

If the requisition has already been placed on a purchase order (the Order Number was displayed earlier), goto task #27. Otherwise, goto task #35.



27. Update the Need-By date if desired.

28. Modify the order Quantity if desired.

29. Update the Price if desired.

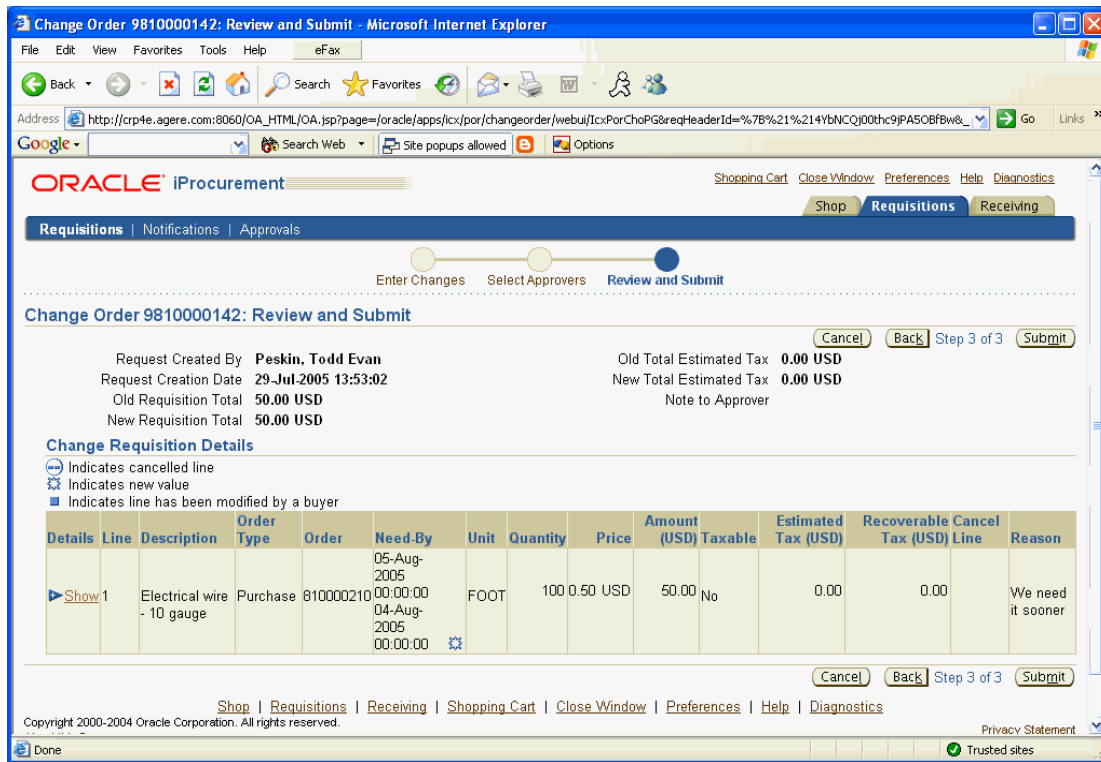
Under certain circumstances, the price cannot be updated.

30. Click the Cancel Line checkbox for any lines that should be cancelled.

31. Provide a Reason.

The reason will be sent to the buyer if this requisition line is currently on a purchase order.

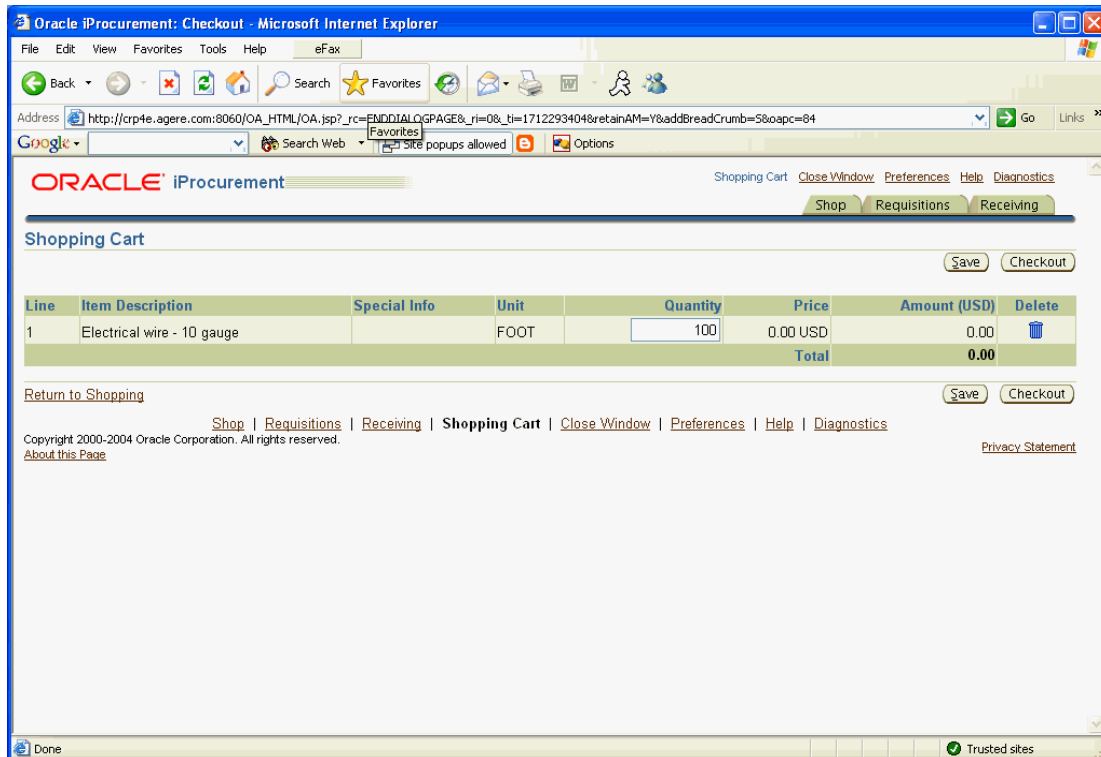
32. Click (B) Next.



33. Review the changes.

34. Click (B) Submit.

End of activity.



35. Complete the requisition and make changes as necessary.

Additional information *Checkout and Complete an iProcurement Requisition*
[../FND/@NAP2P205]

End of activity.

iProcurement Requisition Approval Flows

Chapter 2

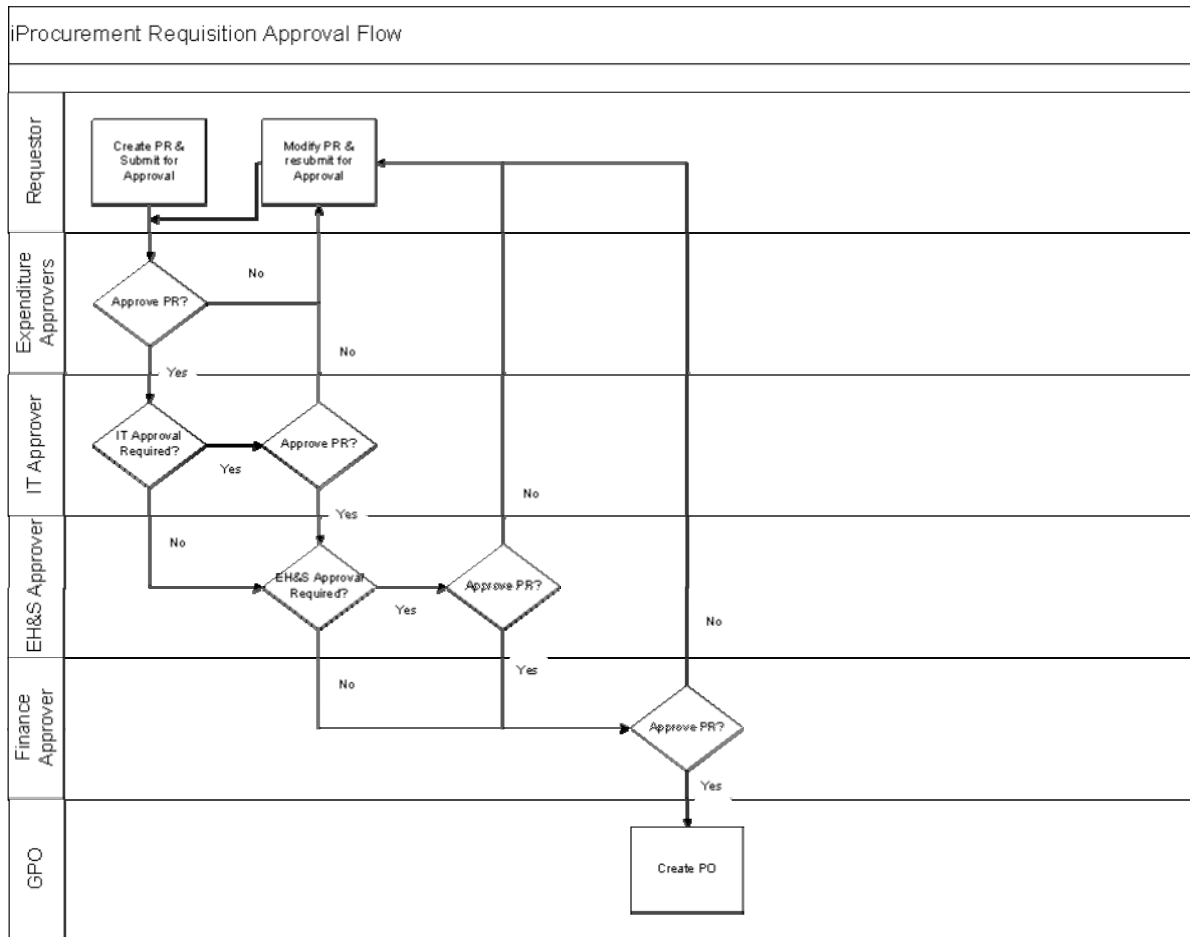
iProcurement Requisition Approval Flows

Section Objectives

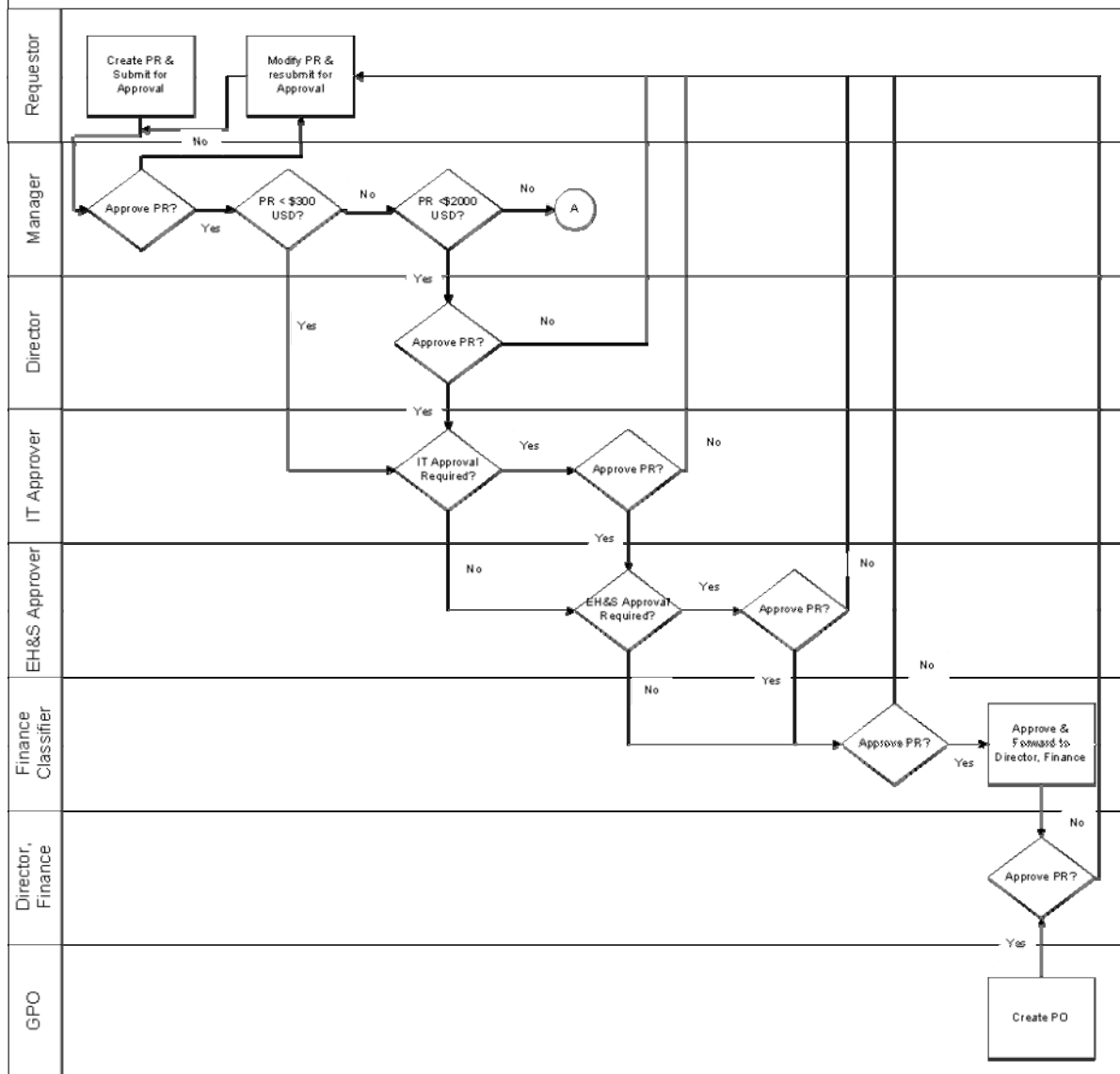
At the end of this section, you should be able to:

- Understand iProcurement Requisition Approval Flows

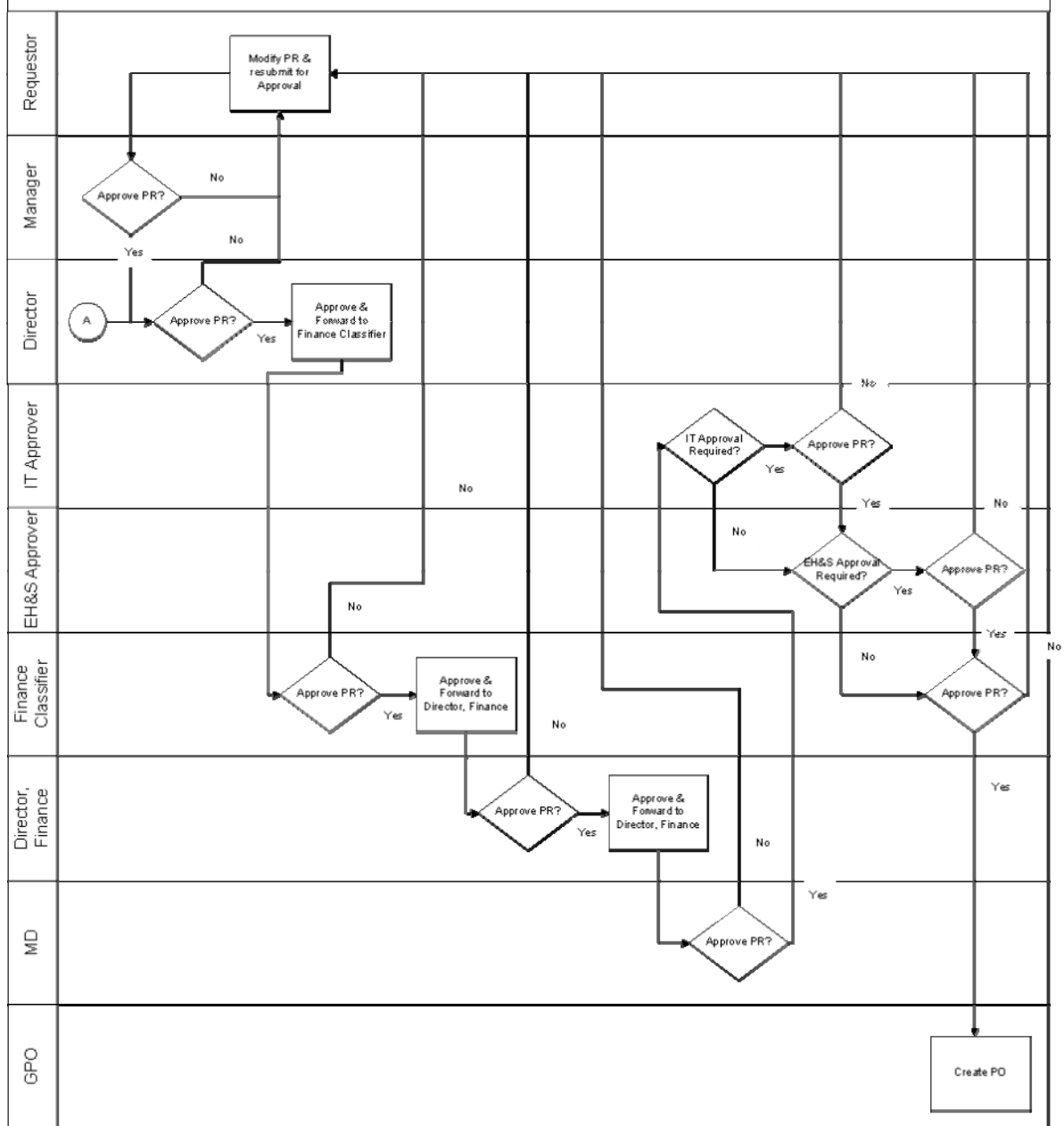
iProcurement Requisition Approval Flows



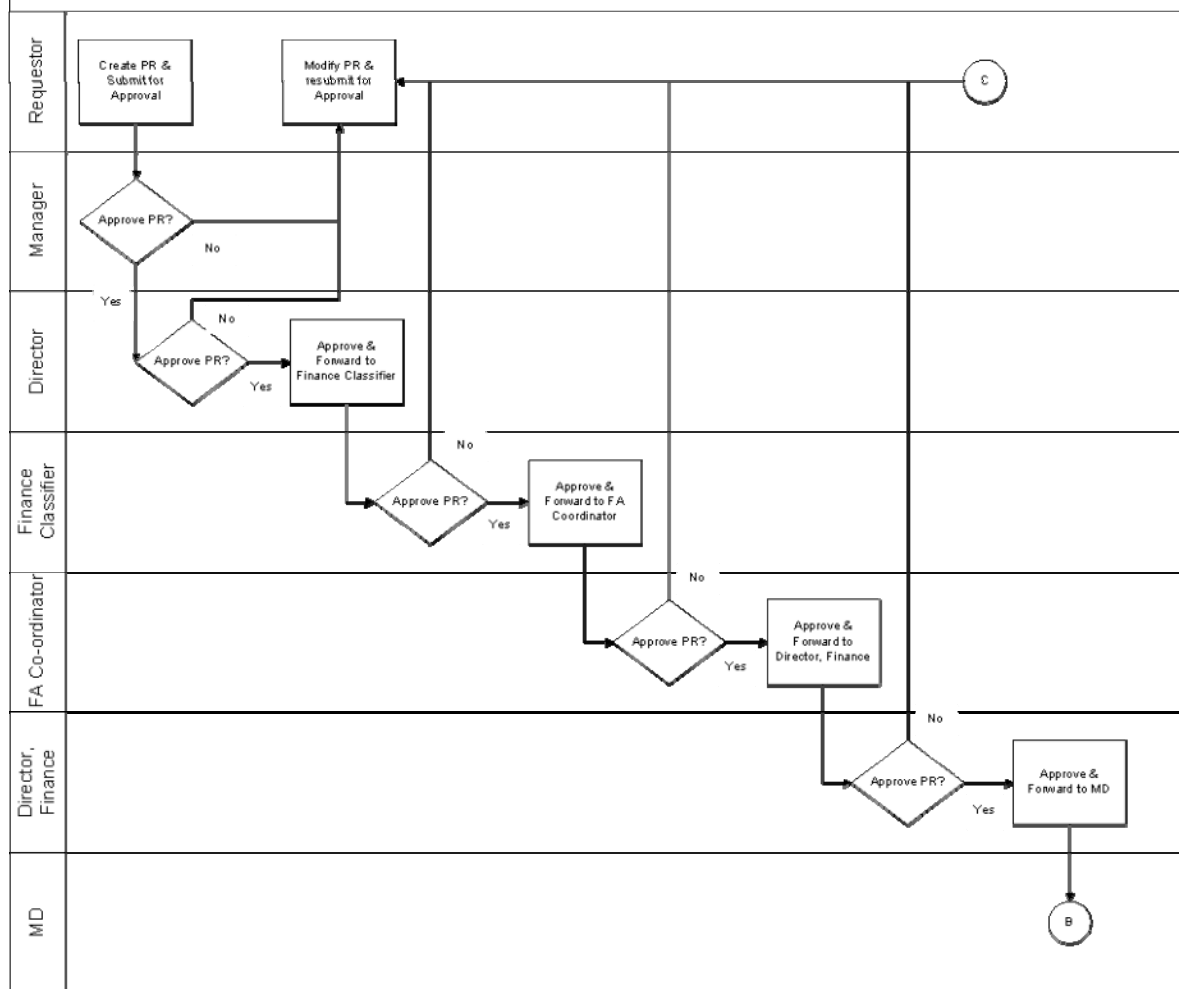
Singapore & Thailand Expense PR Approval - PR < US \$2000



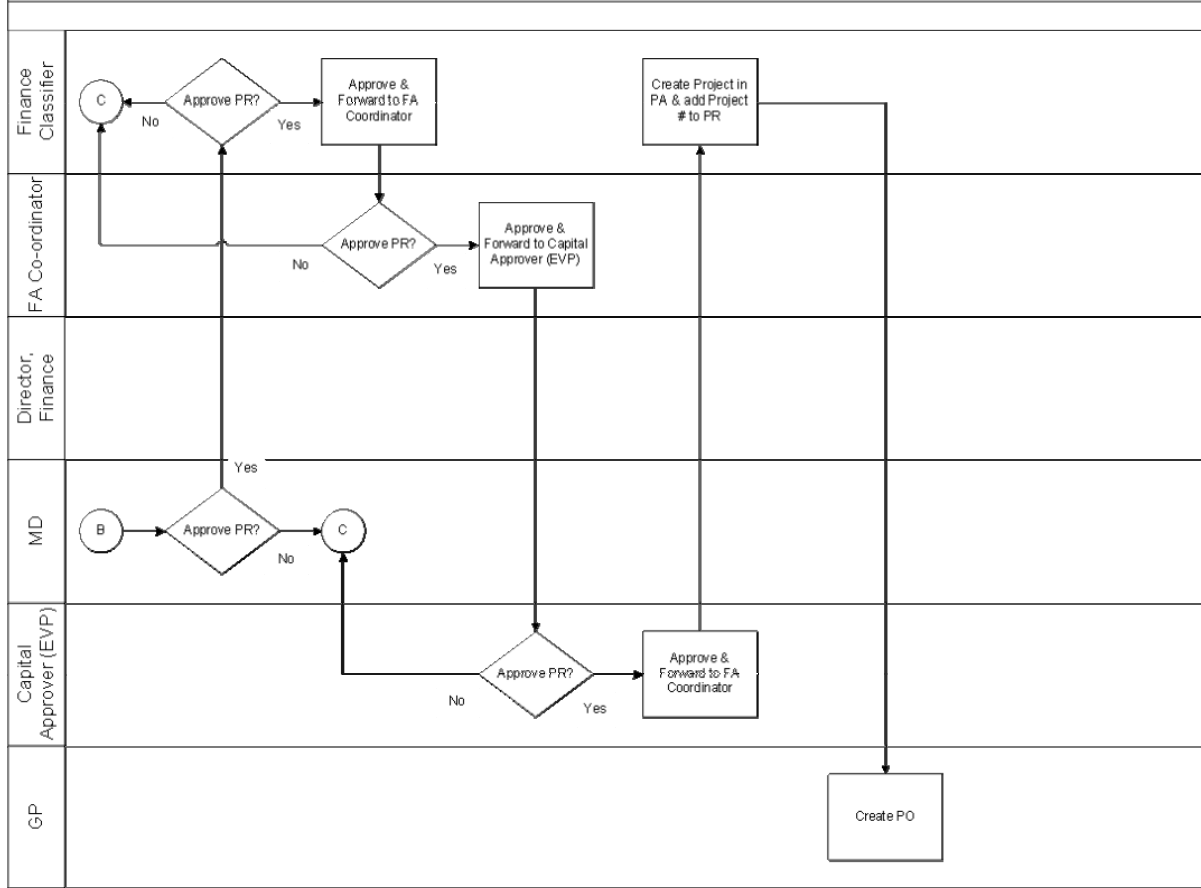
Singapore & Thailand Expense PR Approval - PR > US \$2000



Singapore & Thailand Capital PR Approval



<Singapore & Thailand Capital PR Approval (cont.)



iProcurement Approver

Chapter 3

iProcurement Approver

Section Objectives

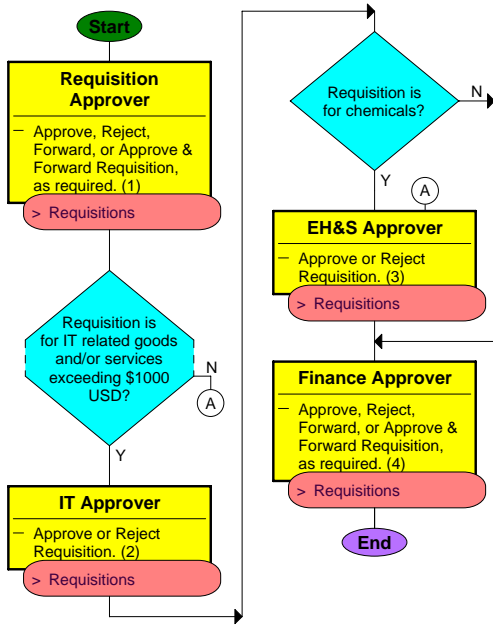
At the end of this section, you should be able to:

- Approve an iProcurement Requisition
- Vacation Handling

Approve an iProcurement Requisition

Approve an iProcurement Requisition

Approve an iProcurement Requisition



Approve a Requisition

iProcurement

N > iProcurement > (ST) Requisitions > (ST) Approvals

Requisitions

1. Determine if approving by iProcurement.

If approving by iProcurement, goto task #22. Otherwise, goto task #2.

2. Open the workflow notification that you received by e-mail.

The screenshot shows an email client window titled "Action Required: Purchase Requisition 9810000207 for Peskin, Todd Evan (11.50 USD) - Message (HTML)". The email header includes the sender "Workflow Mailer - CRPENTP3 [wfmc3@alcerelay.agere.com]" and the recipient "Peskin, Todd Evan (Todd) %". The subject is "Action Required: Purchase Requisition 9810000207 for Peskin, Todd Evan (11.50 USD)".

The main content of the email is a requisition summary:

From: **McCarthy, John J**
To: **Peskin, Todd Evan**
Sent: **08-Jun-2005 13:10:58**
ID: **314273**

Description: **FLUX DISPENSER, WITH PEN TIP, R & R LOTION, 2 OZ. BOTTLE**
Requisition Total: **11.50 USD**
Estimated Tax: **0.00 USD**

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	FLUX DISPENSER, WITH PEN TIP, R & R LOTION, 2 OZ. BOTTLE	TECHNI-TOOL INC	10070935	EACH	1	5.75	5.75
2	FLUX DISPENSER, WITH PEN TIP, R & R LOTION, 2 OZ. BOTTLE	TECHNI-TOOL INC	10070935	EACH	1	5.75	5.75

Approval Sequence

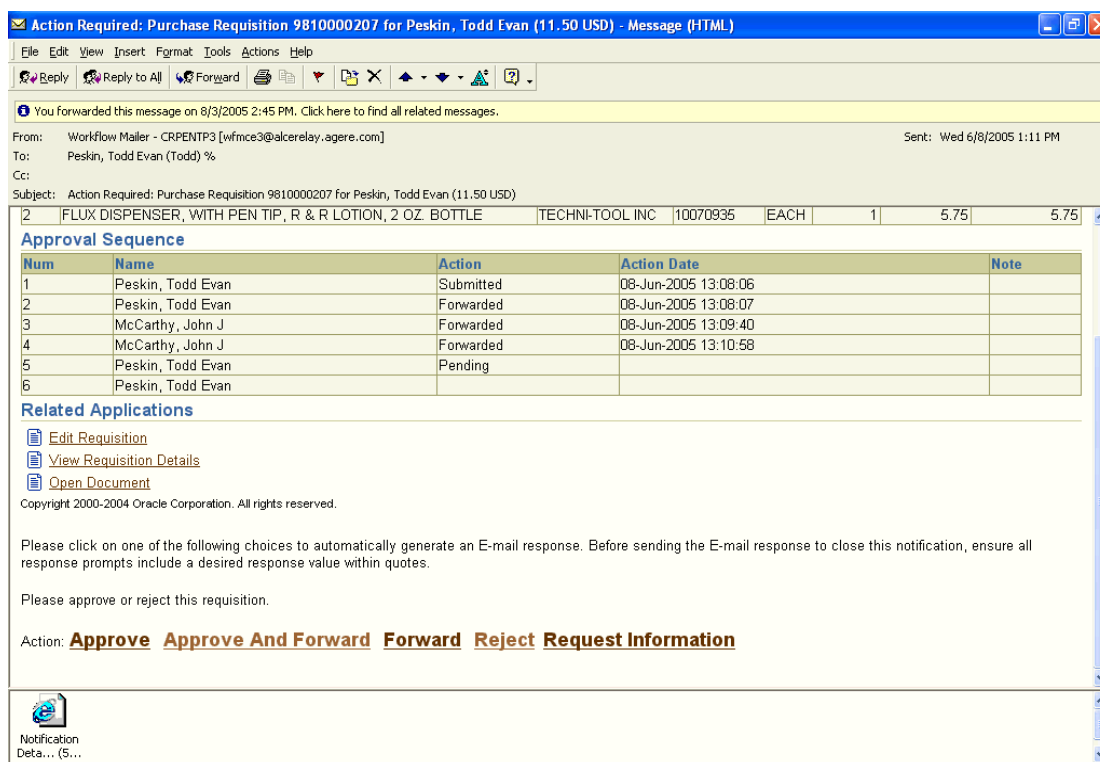
Num	Name	Action	Action Date	Note
1	Peskin, Todd Evan	Submitted	08-Jun-2005 13:08:06	
2	Peskin, Todd Evan	Forwarded	08-Jun-2005 13:08:07	
3	McCarthy, John J	Forwarded	08-Jun-2005 13:09:40	
4	McCarthy, John J	Forwarded	08-Jun-2005 13:10:58	
5	Peskin, Todd Evan	Pending		
6	Peskin, Todd Evan			

Related Applications

- [Edit Requisition](#)
- [View Requisition Details](#)
- [Open Document](#)

Copyright 2000-2004 Oracle Corporation. All rights reserved.

Notification
Data... (S...



If reviewing the full details of the requisition, goto task #3.

If approving, goto task #5.

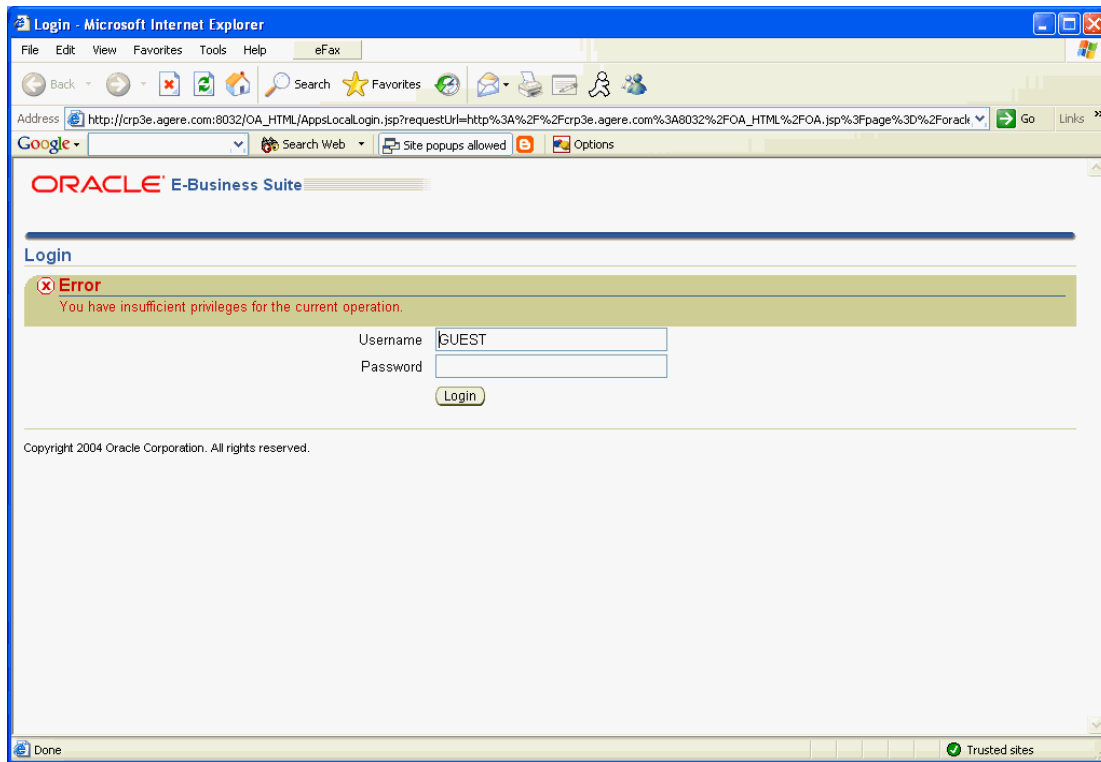
If approving and forwarding, goto task #8.

If forwarding, goto task #12.

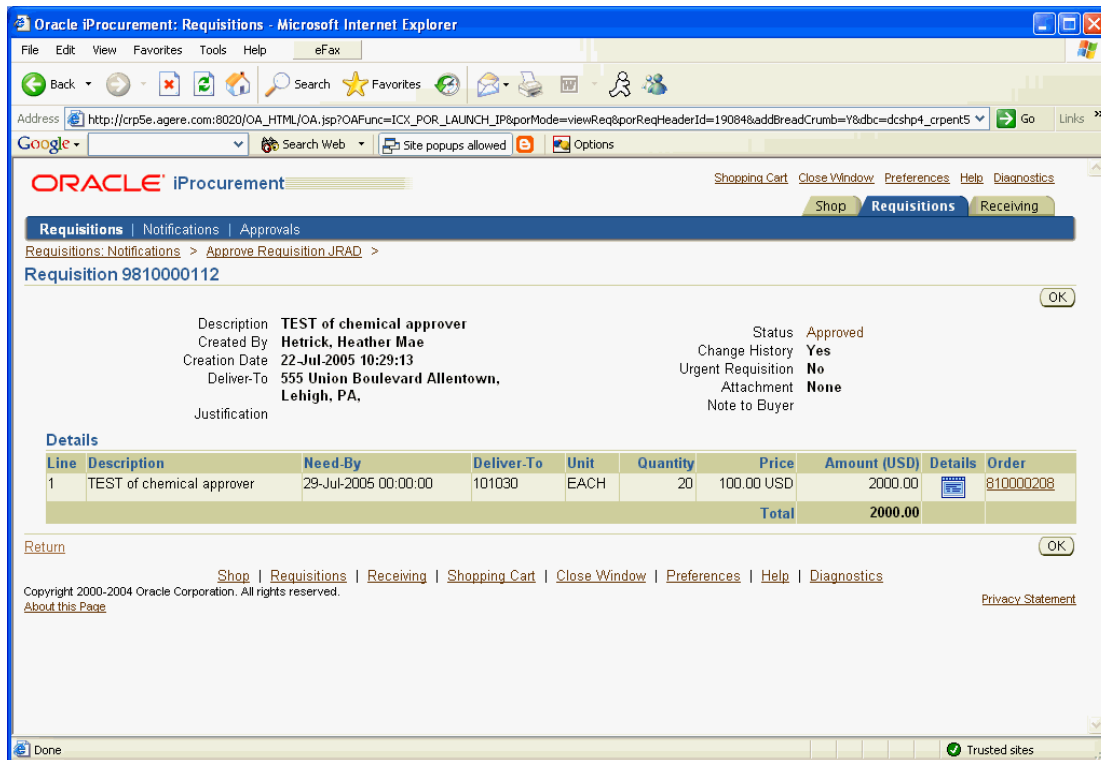
If rejecting, goto task #16.

If requesting additional information, goto task #19.

3. Click the View Requisition Details link.

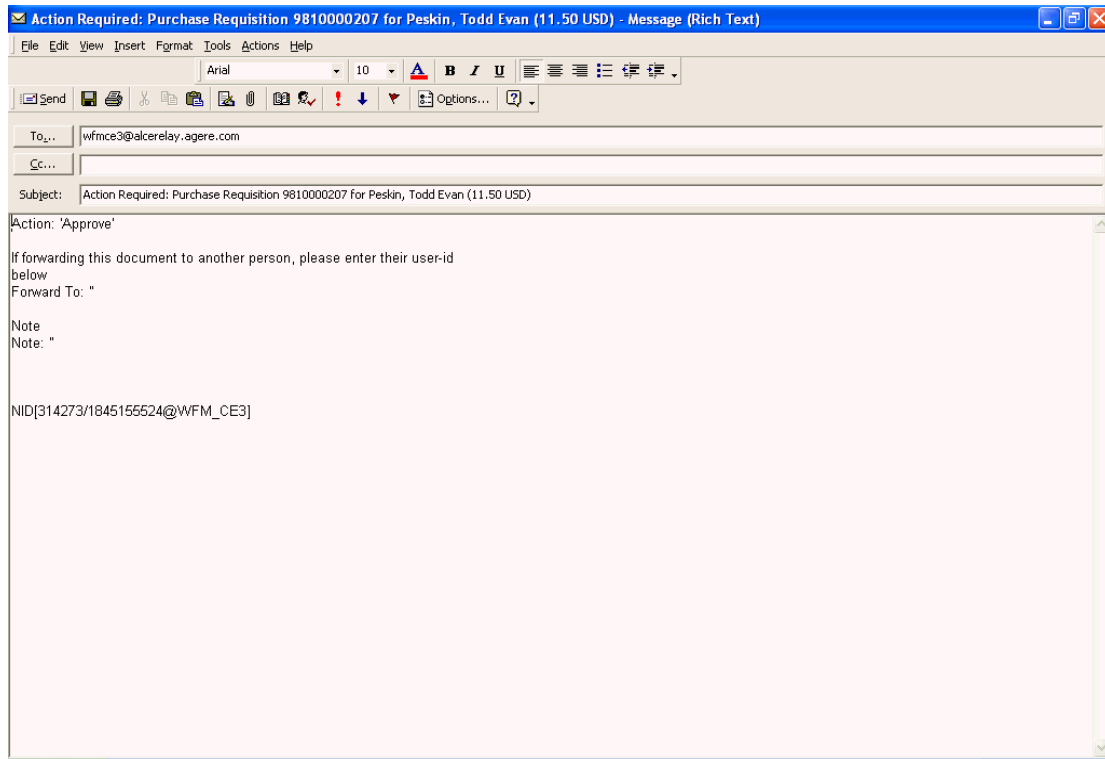


4. Log into the system if necessary by specifying your username and password and clicking (B) Login.



Goto task #24

5. Click the Approve link.

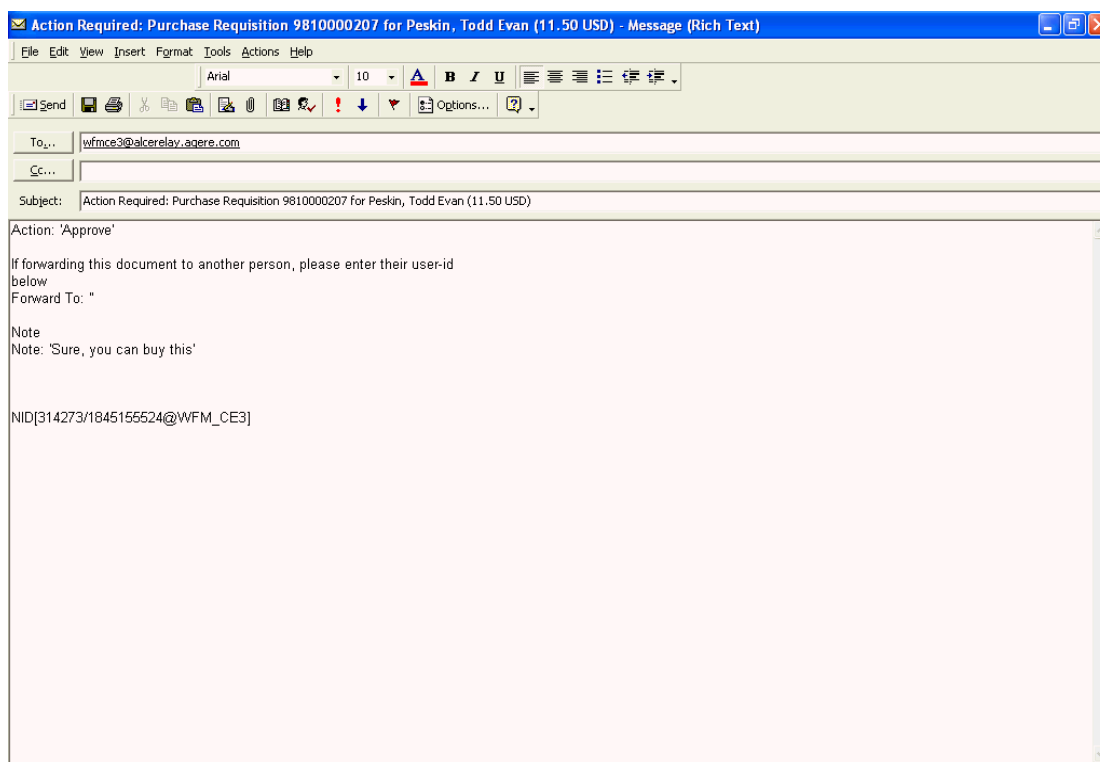


Outlook will open a new e-mail.

Note that the Action has automatically populated as 'Approve'.

DO NOT modify this e-mail in any way except to place values in between any of the single quotes (') for the appropriate fields.

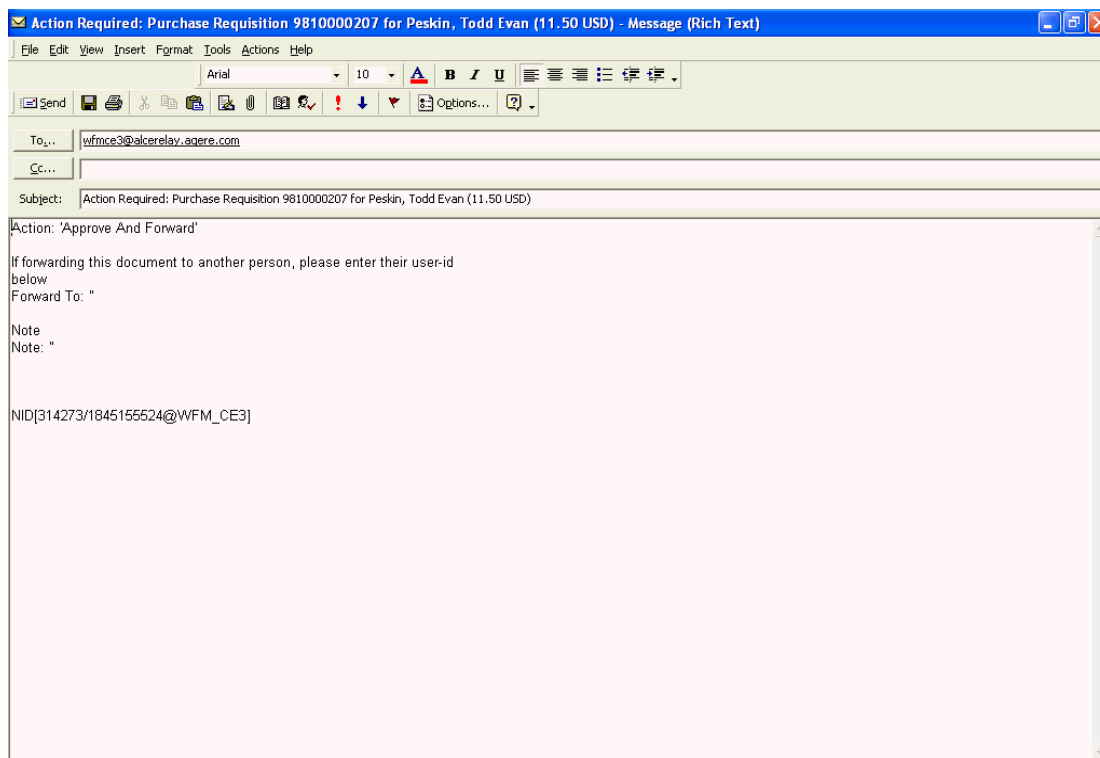
6. Enter a note if desired.



7. Click (B) Send.

End of activity.

8. Click the Approve and Forward link.

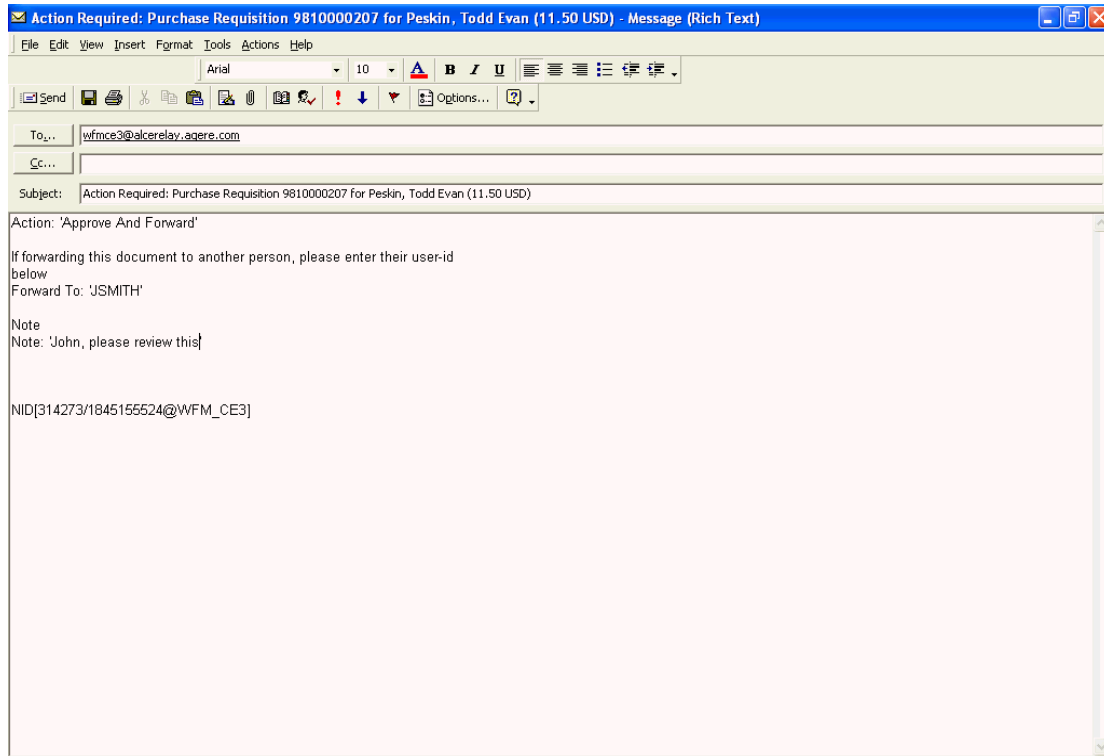


Outlook will open a new e-mail.

Note that the Action has automatically populated as 'Approve and Forward'.

DO NOT modify this e-mail in any way except to place values in between any of the single quotes (') for the appropriate fields.

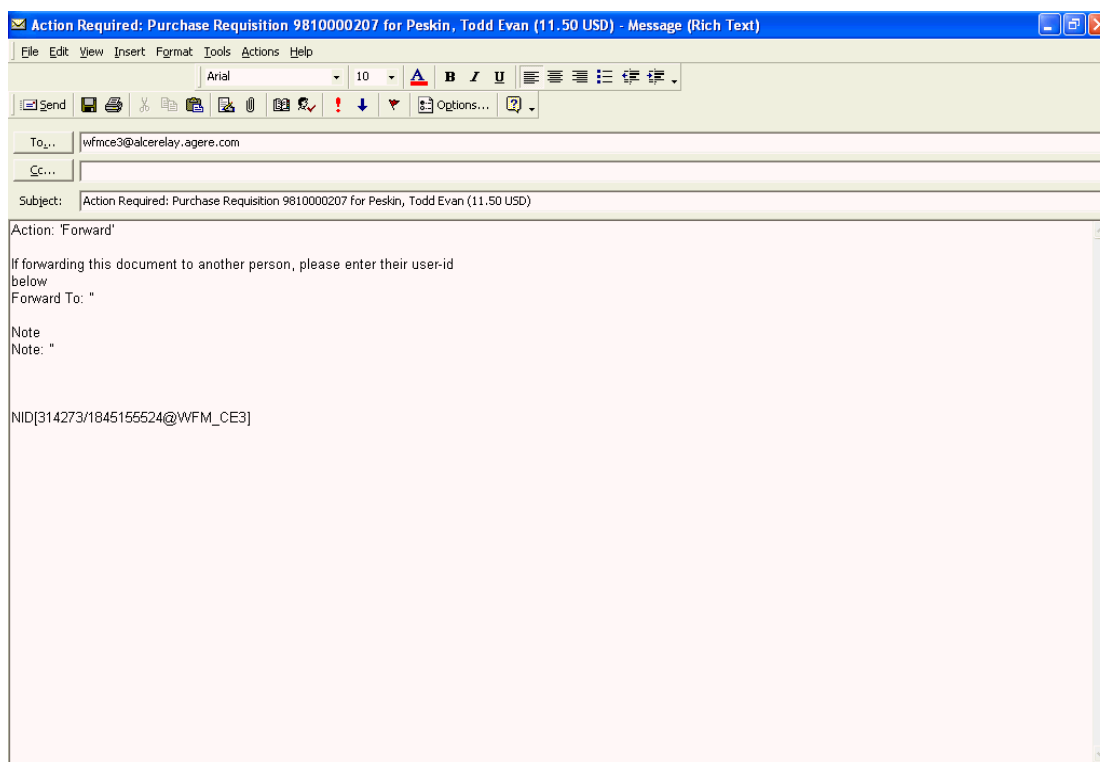
9. Enter the appropriate userid for the person to whom the notification should be forwarded.
10. Enter a note if desired.



11. Click (B) Send.

End of activity.

12. Click the Forward link.

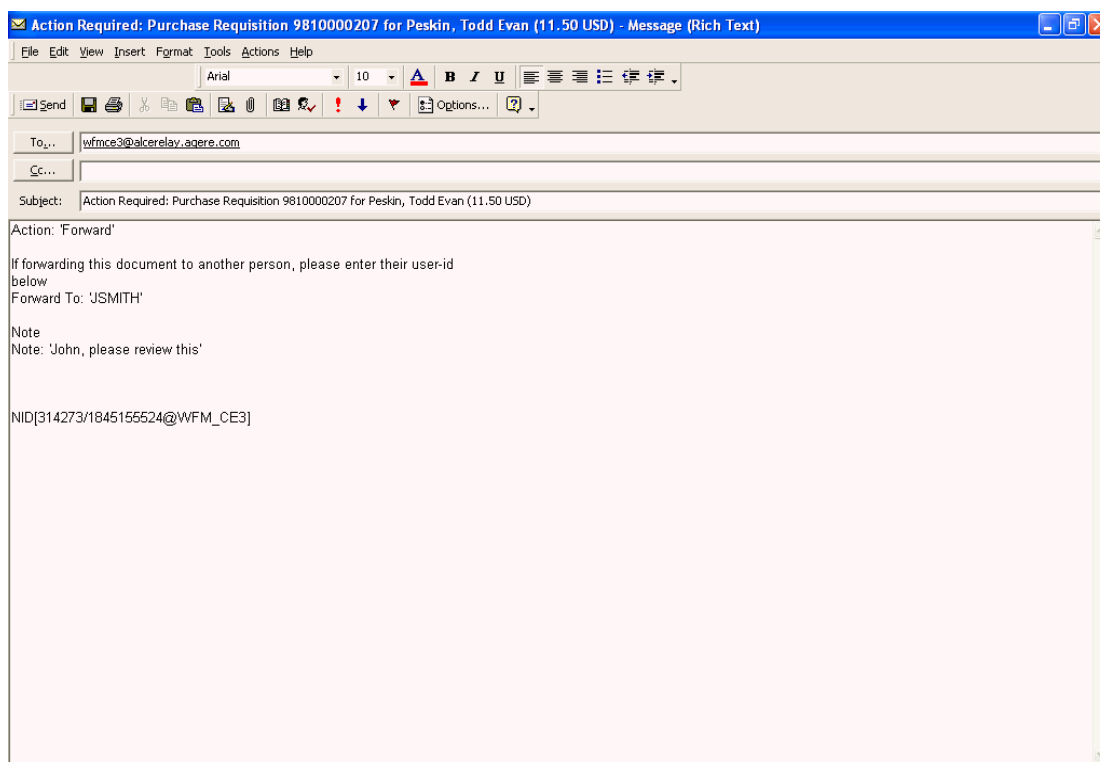


Outlook will open a new e-mail.

Note that the Action has automatically populated as 'Forward'.

DO NOT modify this e-mail in any way except to place values in between any of the single quotes (') for the appropriate fields.

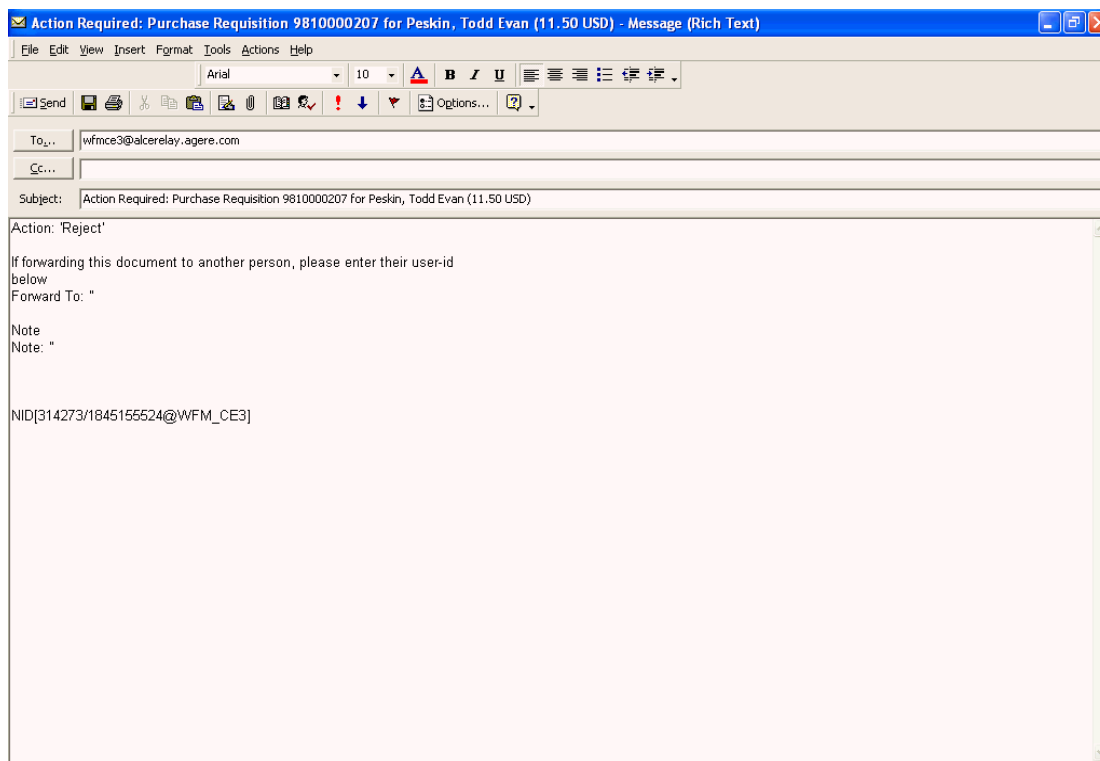
13. Enter the appropriate userid for the person to whom the notification should be forwarded.
14. Enter a note if desired.



15. Click (B) Send.

End of activity.

16. Click the Reject link.

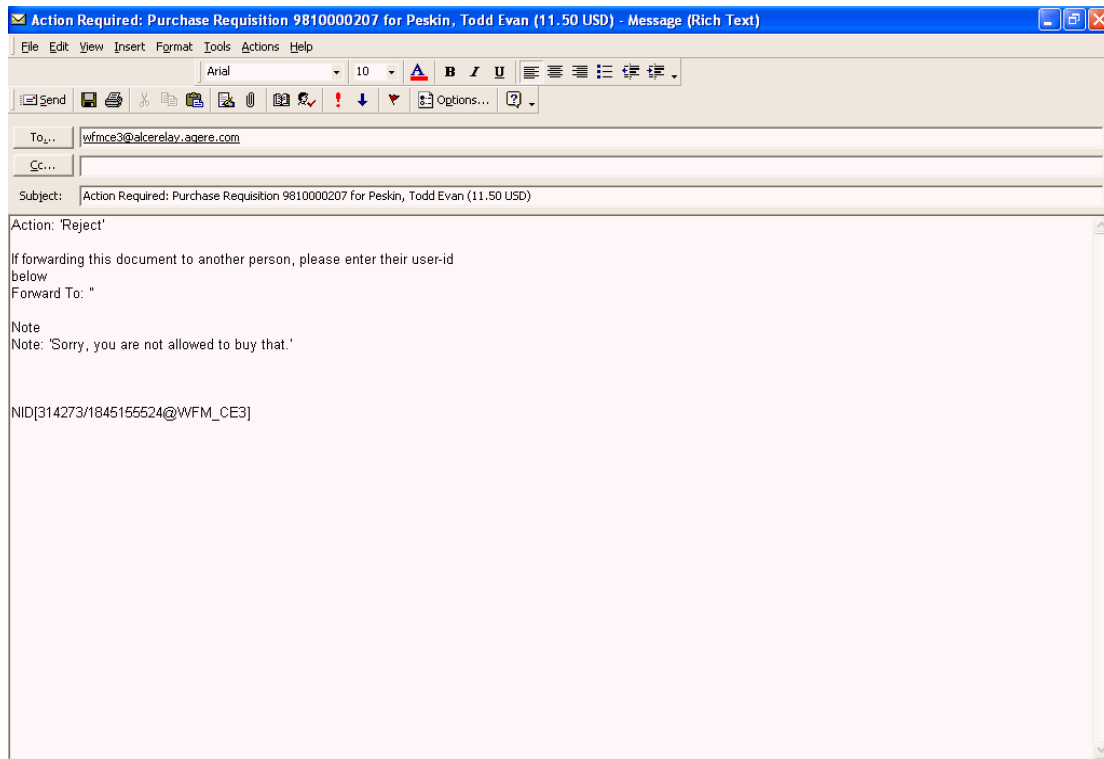


Outlook will open a new e-mail.

Note that the Action has automatically populated as 'Reject'.

DO NOT modify this e-mail in any way except to place values in between any of the single quotes (') for the appropriate fields.

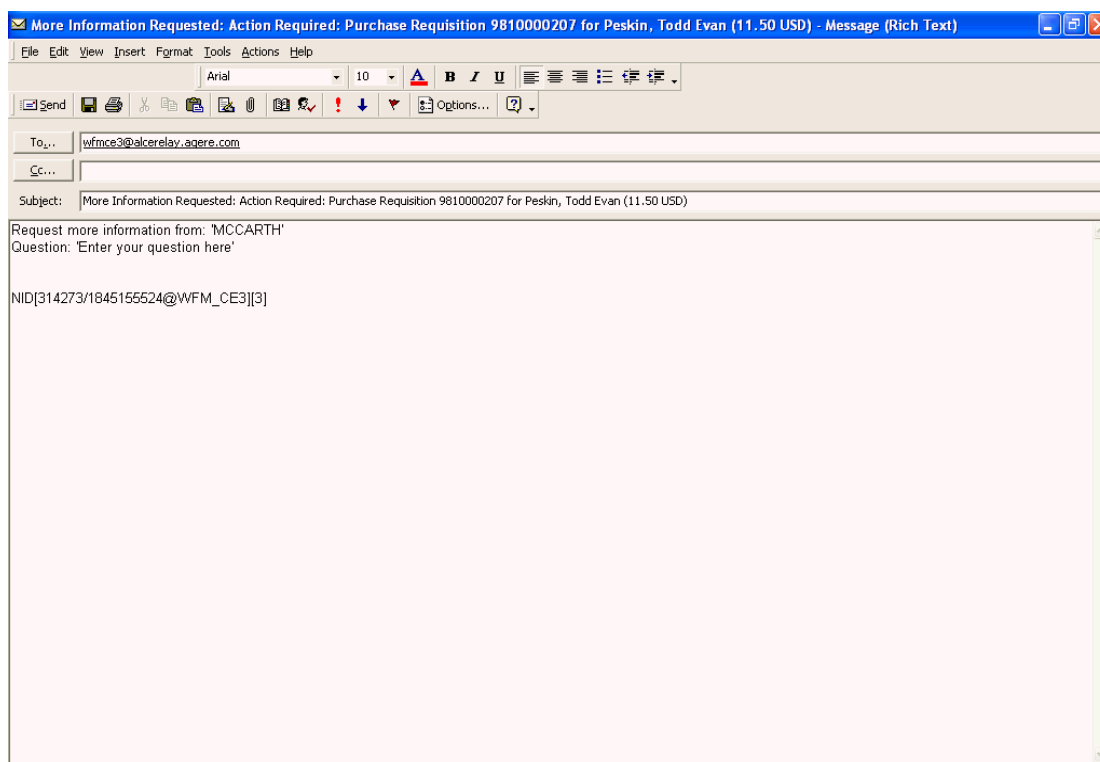
17. Enter a note if desired.



18. Click (B) Send.

End of activity.

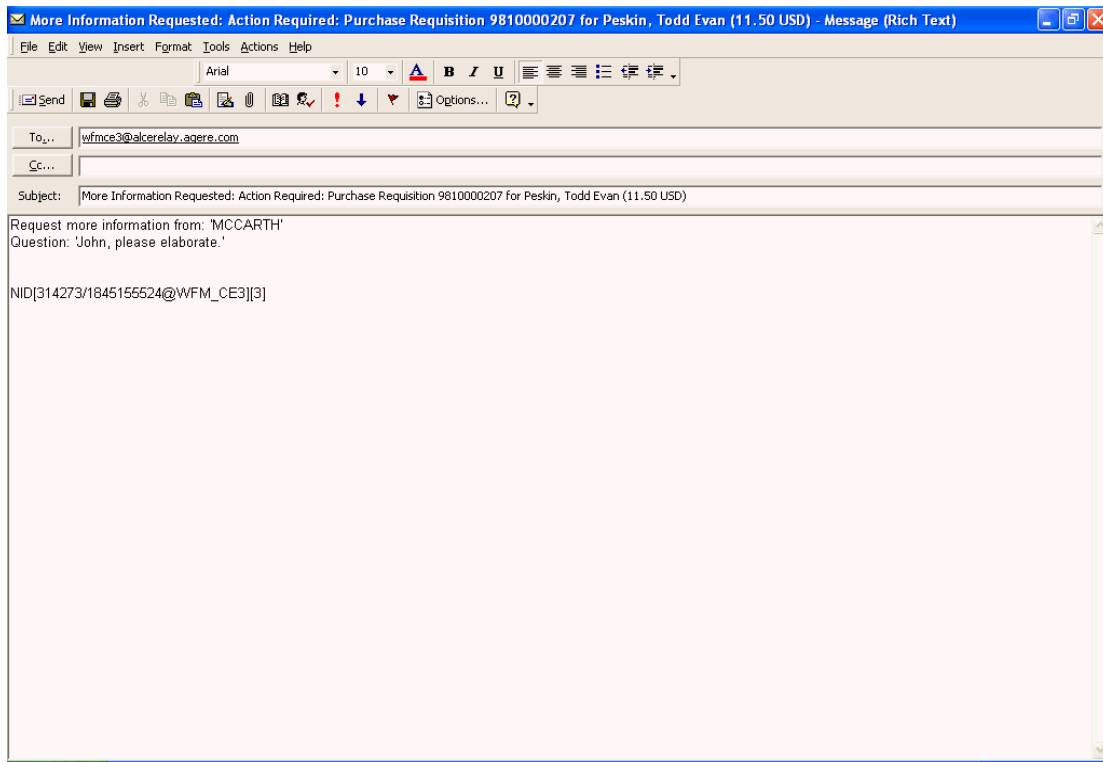
19. Click the Request Information link.



Outlook will open a new e-mail.

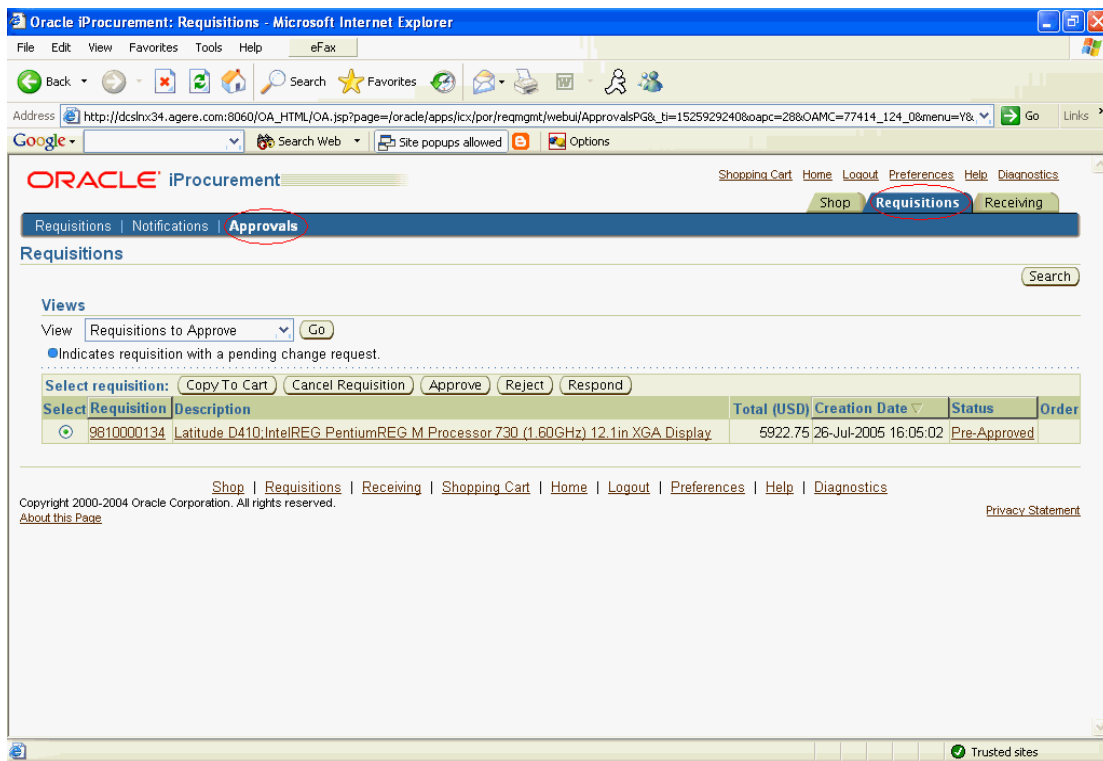
DO NOT modify this e-mail in any way except to place values in between any of the single quotes (') for the appropriate fields.

20. Enter an appropriate question.



21. Click (B) Send.

End of activity.



22. Select Requisitions to Approve (if not already displayed) and click (B) Go.

23. Click on the Requisition link for the appropriate requisition.

Oracle iProcurement: Requisitions - Microsoft Internet Explorer

Address: http://dcslnx34.agere.com:8060/OA_HTML/OA.jsp?OAFunc=ICX_POR_REQMGMT_DETAIL&reqHeaderId=%7B11acW70CvtpoQ0PWty87cuMQ%7D&retainAM=Y&addBrea

Requisitions | Notifications | Approvals

Requisitions: Approvals >

Requisition 9810000134

Copy To Cart Cancel Requisition Approve Reject Respond

Description Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display

Created By Troia, Pat A.

Creation Date 26-Jul-2005 16:05:02

Deliver-To 555 Union Boulevard Allentown, Lehigh, PA.

Justification

Status Pre-Approved

Change History No

Urgent Requisition No

Attachment None

Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order
1	Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	02-Aug-2005 00:00:00	101030	EACH	1	1640.00 USD	1640.00		
2	DellWare Info;Online_Sku	02-Aug-2005 00:00:00	101030	EACH	1	862.87 USD	862.87		
3	Dell W4200HD Plasma TV;Dell 42 inch High Definition Plasma TV with Speakers	02-Aug-2005 00:00:00	101030	EACH	1	2951.02 USD	2951.02		
4	Axim X50v;624MHz;Axim X50v;IntelREG 624MHz, 128MB ROM 64MB SDRAM, VGA 802.11b, BT	02-Aug-2005 00:00:00	101030	EACH	1	468.86 USD	468.86		
Total							5922.75		

Return

Copy To Cart Cancel Requisition Approve Reject Respond

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

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Privacy Statement

Trusted sites

24. Review the requisition.

25. Click the Details icon for the full requisition line details if desired.

Oracle iProcurement: Requisitions - Microsoft Internet Explorer

Address: http://dcslnx34.agere.com:8060/OA_HTML/OA.jsp?OAFunc=ICX_POR_REQMGMT_LIFECYCLE&reqHeaderId=%7B11acW70CvtpoQ0PWty87cuMQ%7D&reqLineId=%7B11r

ORACLE iProcurement

Shopping Cart Home Logout Preferences Help Diagnostics

Shop Requisitions Receiving

Requisitions | Notifications | Approvals

Requisitions: Approvals > Requisition 9810000134 >

Requisition 9810000134 Line 1: Details

OK

Requisition

Description Latitude_D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display

Status Pre-Approved

Change History No

Current Approver Peskin, Todd Evan

Approver Phone

Date Sent to Approver

Show Additional Information

Order

No data exists.

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
No data exists.					

Receipt

Receipt	Transaction Date	Received Unit	Received By	Received by Phone	Items Returned
No data exists.					

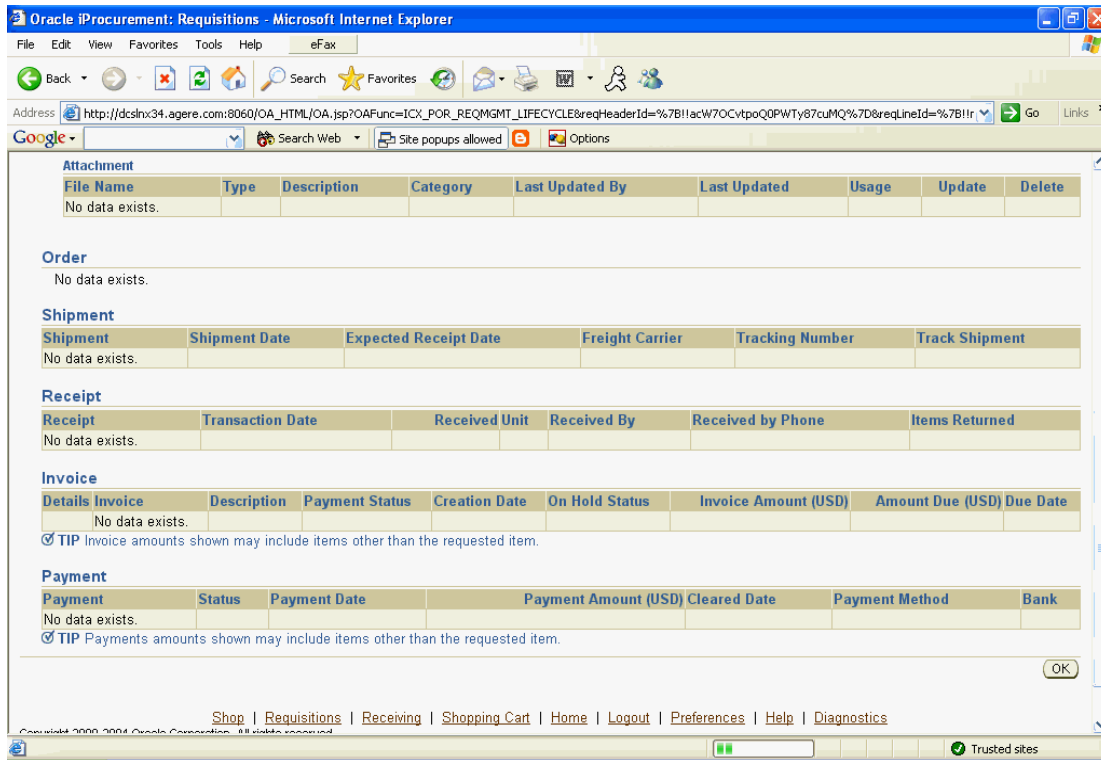
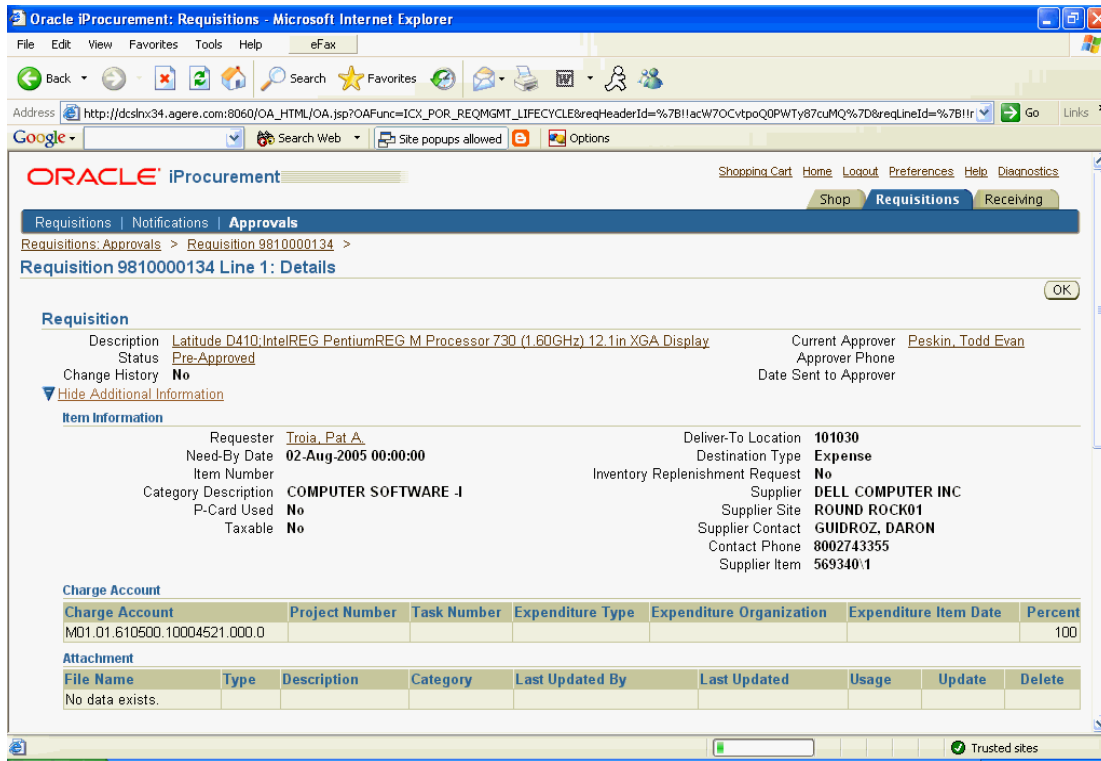
Invoice

Details Invoice	Description	Payment Status	Creation Date	On Hold Status	Invoice Amount (USD)	Amount Due (USD)	Due Date
No data exists.							

TIP Invoice amounts shown may include items other than the requested item.

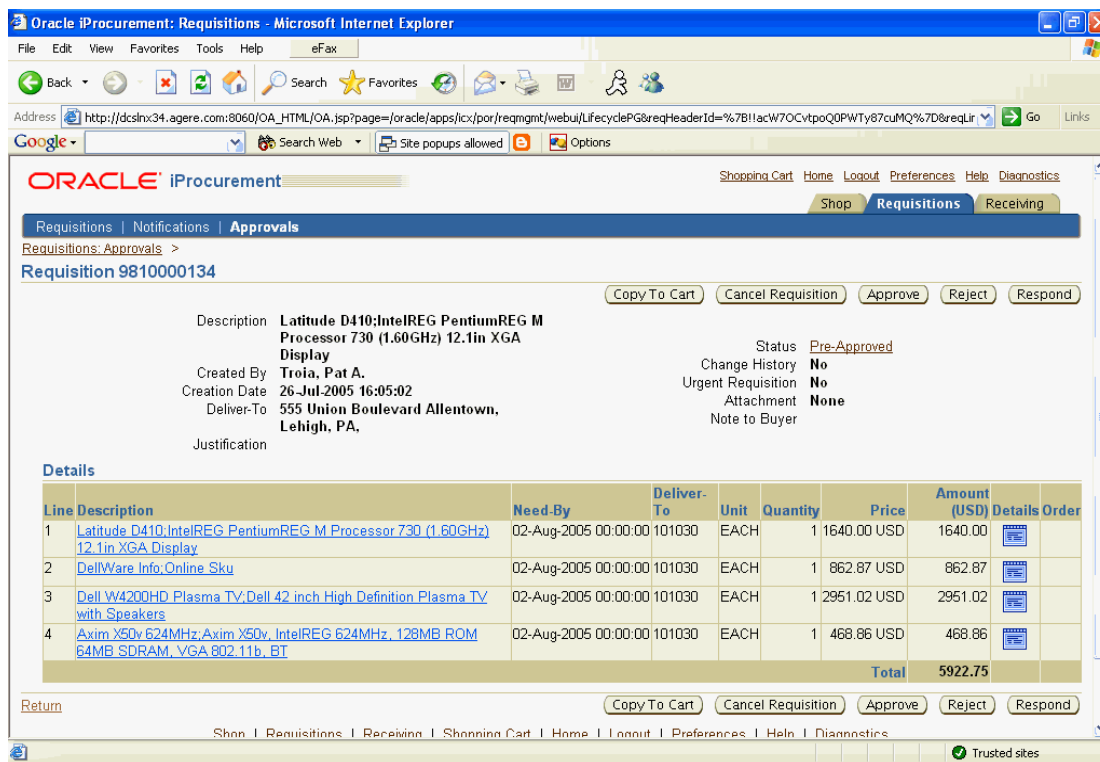
Trusted sites

26. Click the Show Additional Information link for the full line information.



27. Click (B) OK.

If additional lines need to be reviewed, goto task #25.



If approving the requisition without specifying a note, goto task #28.

If rejecting the requisition, goto task #29.

IF entering a note; goto task #30.

28. Click (B) Approve.

End of activity.

29. Click (B) Respond.

Do NOT click (B) Reject because you will not be able to enter a note to the requestor. If you click (B) Respond, then you will be given the opportunity to enter an appropriate note when rejecting.

Goto task #31

30. Click (B) Respond.

Notification Details - Microsoft Internet Explorer

Address: http://crp4e.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/icc/por/reqmgmt/webui/ReqDetailsPG&reqHeaderId=%7B11gChoaX3hwZu7gicUdU-Rw%7D&retainAF

ORACLE iProcurement

Requisitions | Notifications | Approvals

Purchase Requisition 9810000138 for Troia, Pat A. (5922.75 USD)

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

From: Troia, Pat A.
 To: Peskin, Todd Evan
 Sent: 26-Jul-2005 17:07:54
 ID: 290971

Description: Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display
 Requisition Total: 5922.75 USD
 Estimated Tax: 0.00 USD

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
1	Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display	DELL COMPUTER INC	10004521	EACH	1	1640.00	1640.00
2	DellWare Info;Online Sku	DELL COMPUTER INC	10004521	EACH	1	862.87	862.87
3	Dell W4200HD Plasma TV;Dell 42 inch High Definition Plasma TV with Speakers	DELL COMPUTER INC	10004521	EACH	1	2951.02	2951.02
4	Axim X50v 624MHz;Axim X50v, IntelREG 624MHz, 128MB ROM 64MB SDRAM, VGA 802.11b, BT	DELL COMPUTER INC	10004521	EACH	1	468.86	468.86

Approval Sequence

Num	Name	Action	Action Date	Note
1	Troia, Pat A.	Submitted	26-Jul-2005 17:07:54	
2	Troia, Pat A.	Forwarded	26-Jul-2005 17:07:54	
3	Peskin, Todd Evan	Pending		
4	McCarthy, John J			

Notification Details - Microsoft Internet Explorer

Address: http://crp4e.agere.com:8060/OA_HTML/OA.jsp?page=/oracle/apps/icc/por/reqmgmt/webui/ReqDetailsPG&reqHeaderId=%7B11gChoaX3hwZu7gicUdU-Rw%7D&retainAF

ORACLE iProcurement

Requisitions | Notifications | Approvals

Purchase Requisition 9810000138 for Troia, Pat A. (5922.75 USD)

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

From: Troia, Pat A.
 To: Peskin, Todd Evan
 Sent: 26-Jul-2005 17:07:54
 ID: 290971

Description: Latitude D410;IntelREG PentiumREG M Processor 730 (1.60GHz) 12.1in XGA Display
 Requisition Total: 5922.75 USD
 Estimated Tax: 0.00 USD

Requisition Lines

Line	Description	Supplier	Cost Center	Unit	Quantity	Price (USD)	Amount (USD)
4	Axim X50v 624MHz;Axim X50v, IntelREG 624MHz, 128MB ROM 64MB SDRAM, VGA 802.11b, BT	DELL COMPUTER INC	10004521	EACH	1	468.86	468.86

Approval Sequence

Num	Name	Action	Action Date	Note
1	Troia, Pat A.	Submitted	26-Jul-2005 17:07:54	
2	Troia, Pat A.	Forwarded	26-Jul-2005 17:07:54	
3	Peskin, Todd Evan	Pending		
4	McCarthy, John J			

Related Applications

- Edit Requisition
- View Requisition Details
- Open Document

Response

Forward To: All Employees and Users

Note:

Return to Worklist Display next notification after my response

Approve | Approve And Forward | Forward | Reject | Reassign | Request Information

Shop | Requisitions | Receiving | Shopping Cart | Home | Logout | Preferences | Help | Diagnostics

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31. Enter an appropriate note if desired.

If approving, goto task #32.

If approving and forwarding to an additional user, goto task #33.

If forwarding without providing your dollar level approval, goto task #35.

If rejecting, goto task #37.

If reassigning the approval notification to another user, goto task #38.

If requesting more information, goto task #43.

32. Click (B) Approve.

End of activity.

33. Specify the appropriate Forward To employee.

You may use the flashlight to search for an employee.

34. Click (B) Approve and Forward.

End of activity.

35. Specify the appropriate Forward To employee.

You may use the flashlight to search for an employee.

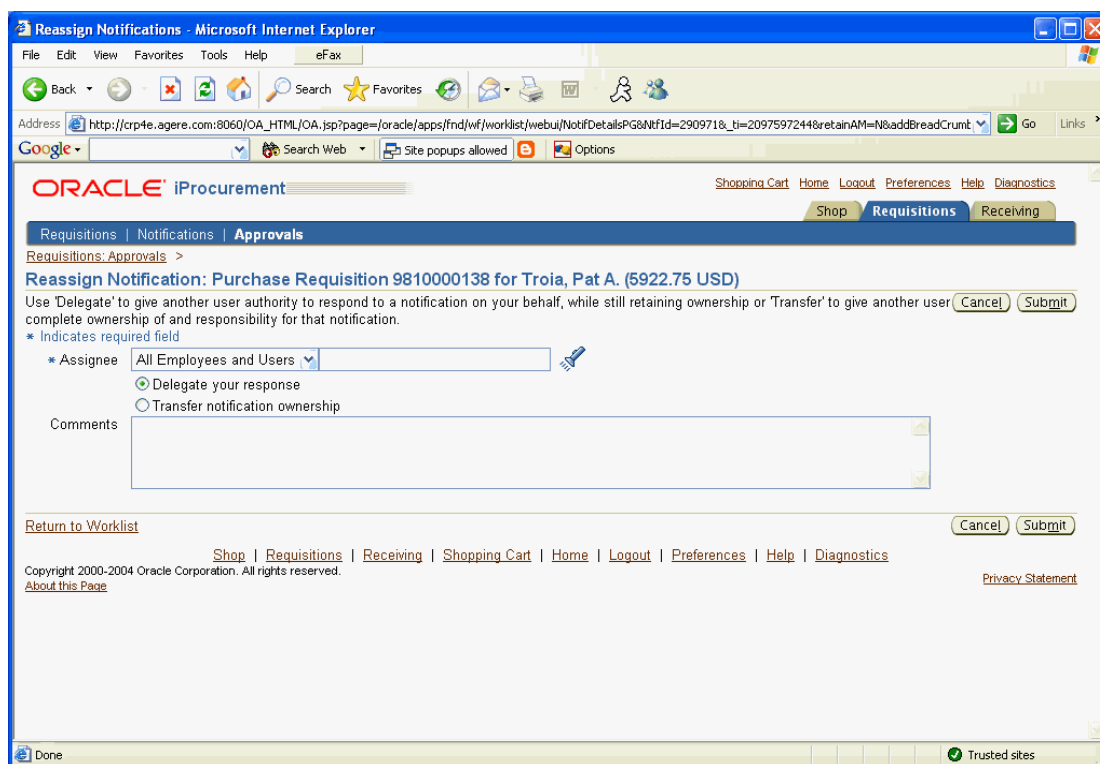
36. Click (B) Forward.

End of activity.

37. Click (B) Reject.

End of activity.

38. Click (B) Reassign.



39. Specify the appropriate Assignee employee.

You may use the flashlight to search for an employee.

40. Select the appropriate type of reassignment.

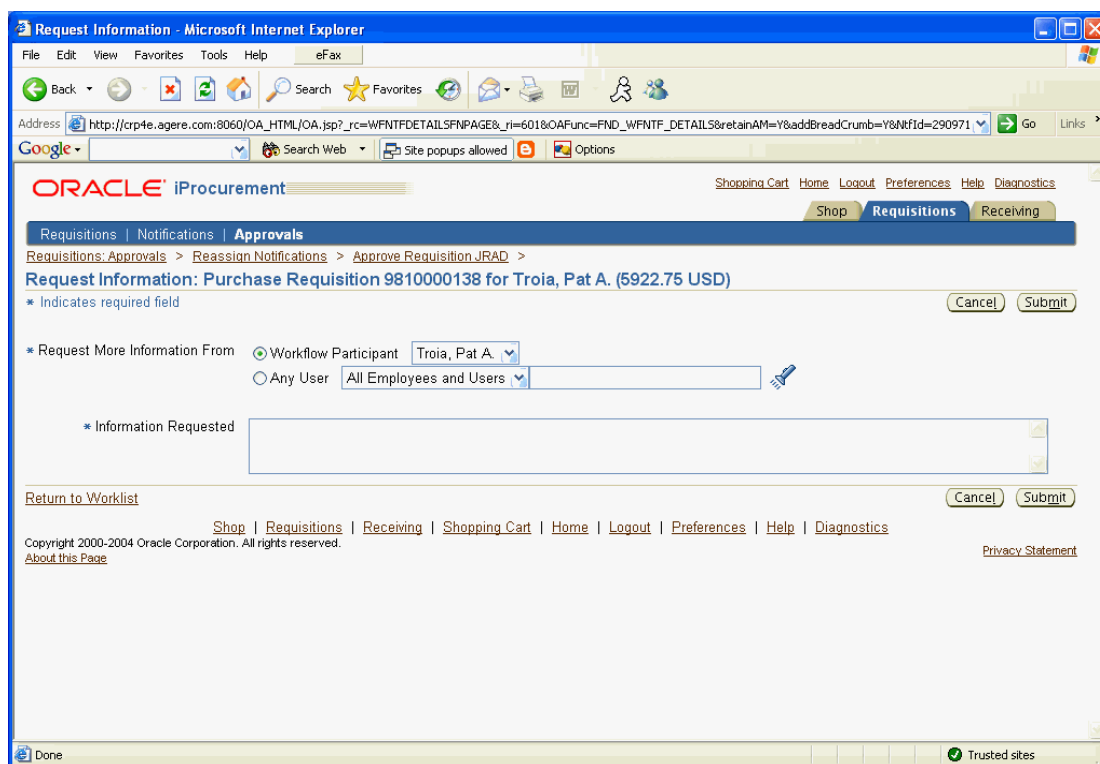
- Delegate your response allows you to delegate your approval authority to the new approver.
- Transfer notification ownership allows you to simply transfer the approval notification to another employee. The system will use the new approver's dollar approval authority when he responds to the notification.

41. Enter comments to the new approver if desired.

42. Click (B) Submit.

End of activity.

43. Click (B) Request Information



44. Select the user that you would like to contact for more information.

You can either select a workflow participant from the drop-down list or you can manually select any employee in the system by selecting the Any User radio button and specifying the employee.

45. Enter the Information Requested.

This text will be sent to the specified employee.

End of activity.

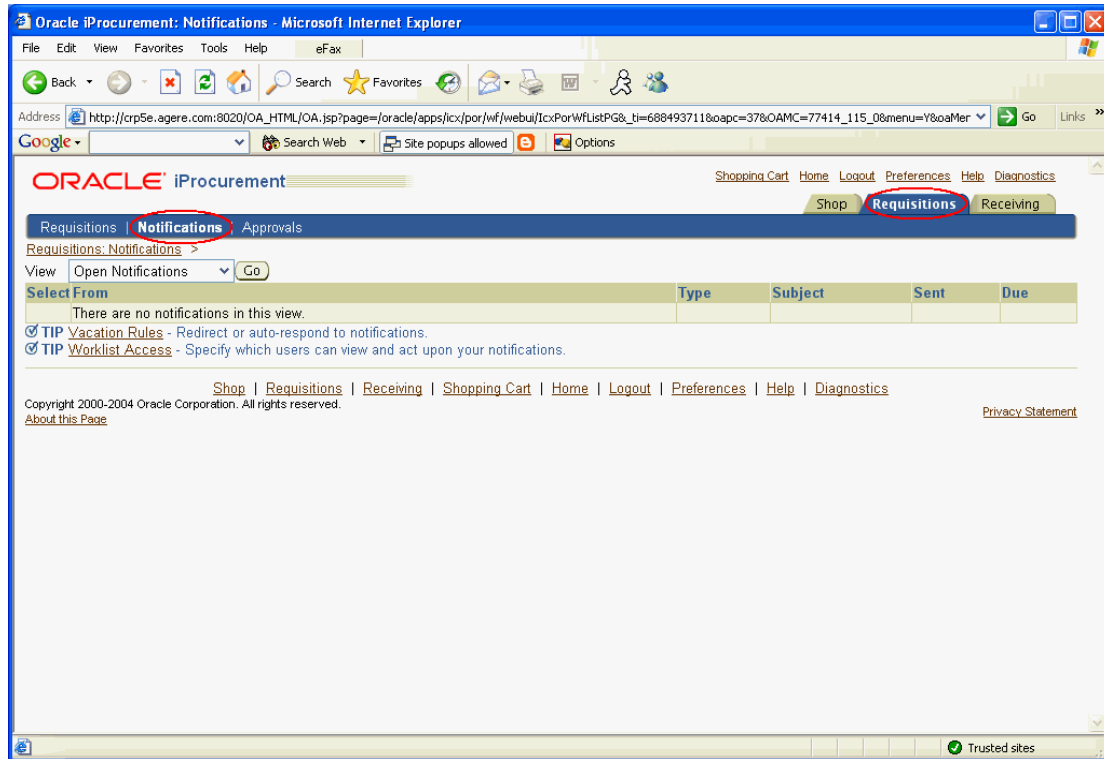
Vacation Handling

Vacation Handling

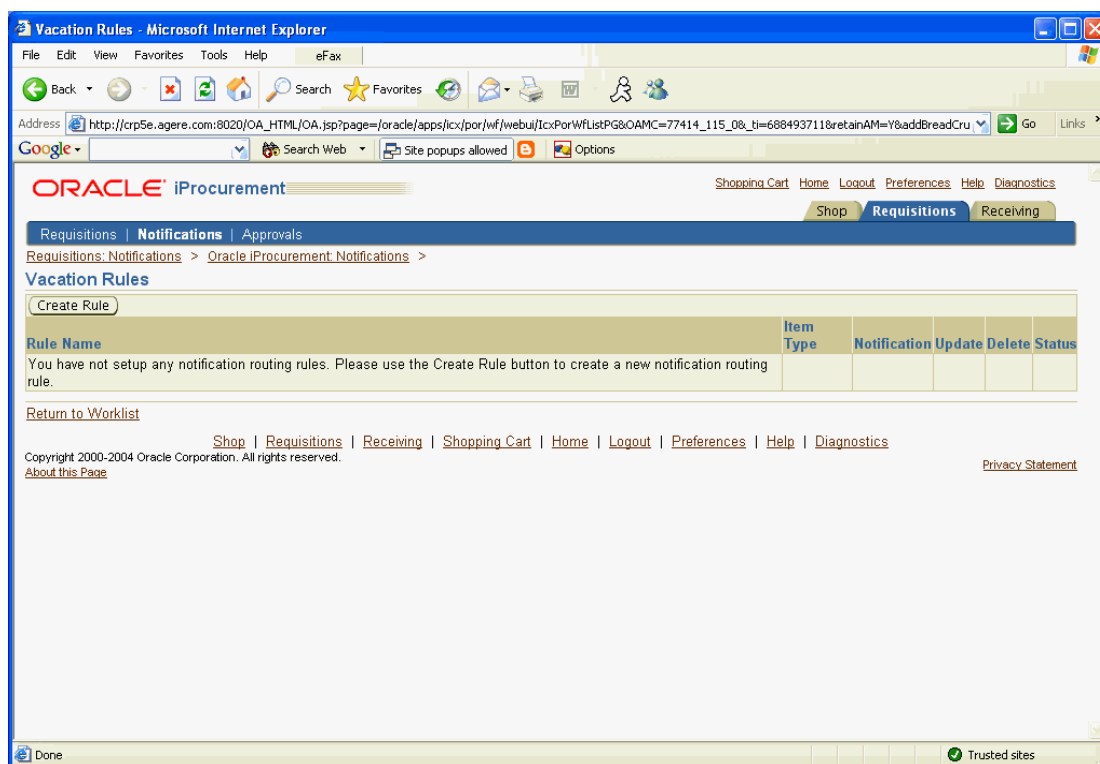
iProcurement

N > iProcurement > (ST) Requisitions > (ST) Notifications

Requisitions: Notifications



1. Click on the Vacation Rules link.

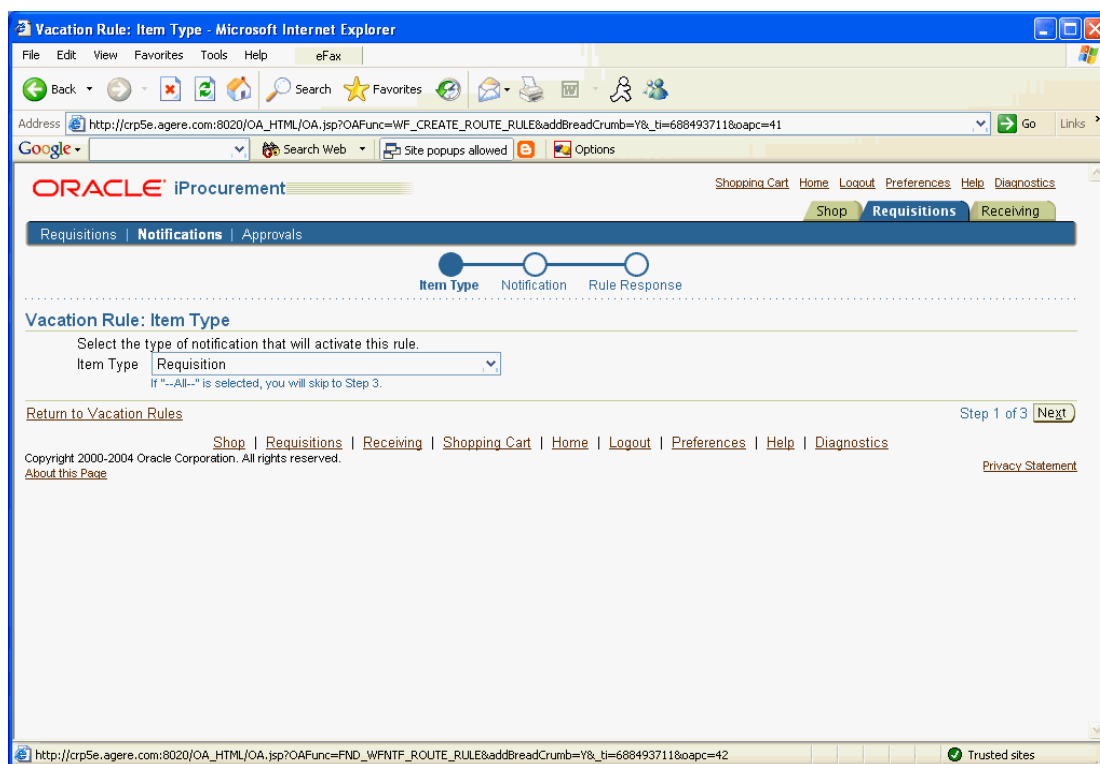


If creating a vacation handling rule, goto task #2.

If updating a rule, goto task #13.

If deleting a rule, goto task #14.

2. Click (B) Create Rule.

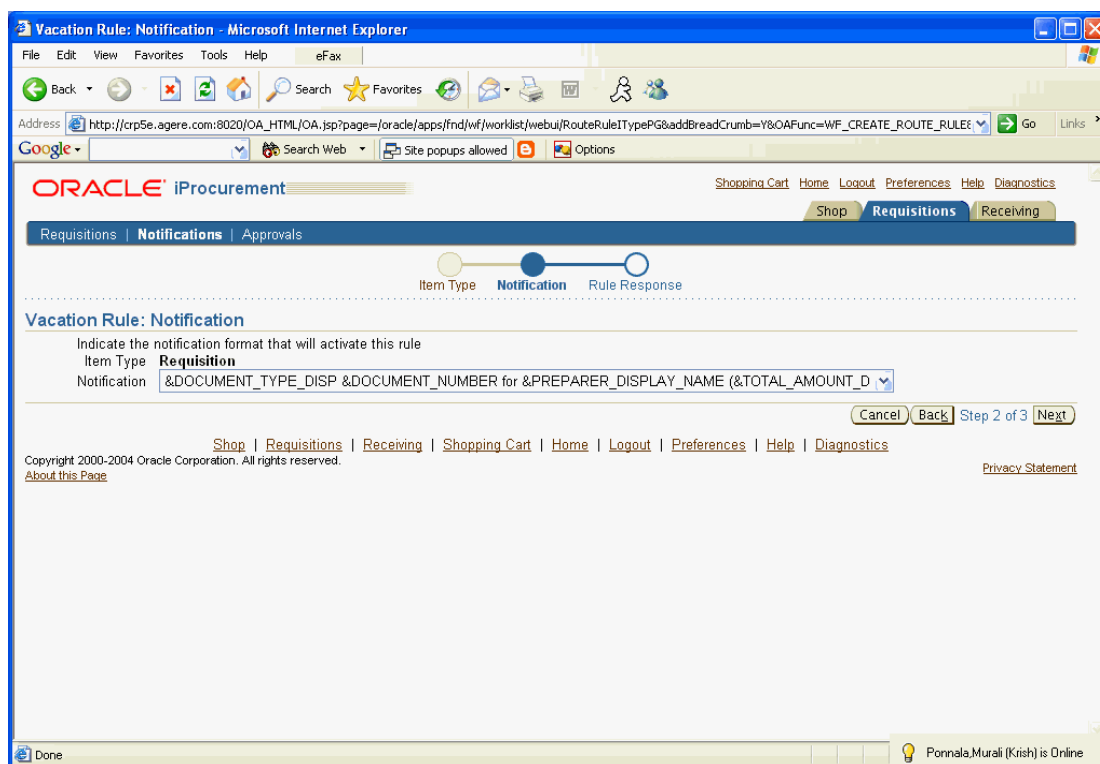


3. Select the appropriate Item Type.

For requisition approval notifications, select an Item Type of "Requisition".

The Item Type list will contain all of the types of notifications that you have previously received in the system. You will not be able to create a vacation-handling rule for any type of notification that you have not already received at some point. If this is the case, then you can select "--All--" to forward all of your Oracle notifications to another user.

4. Click (B) Next.

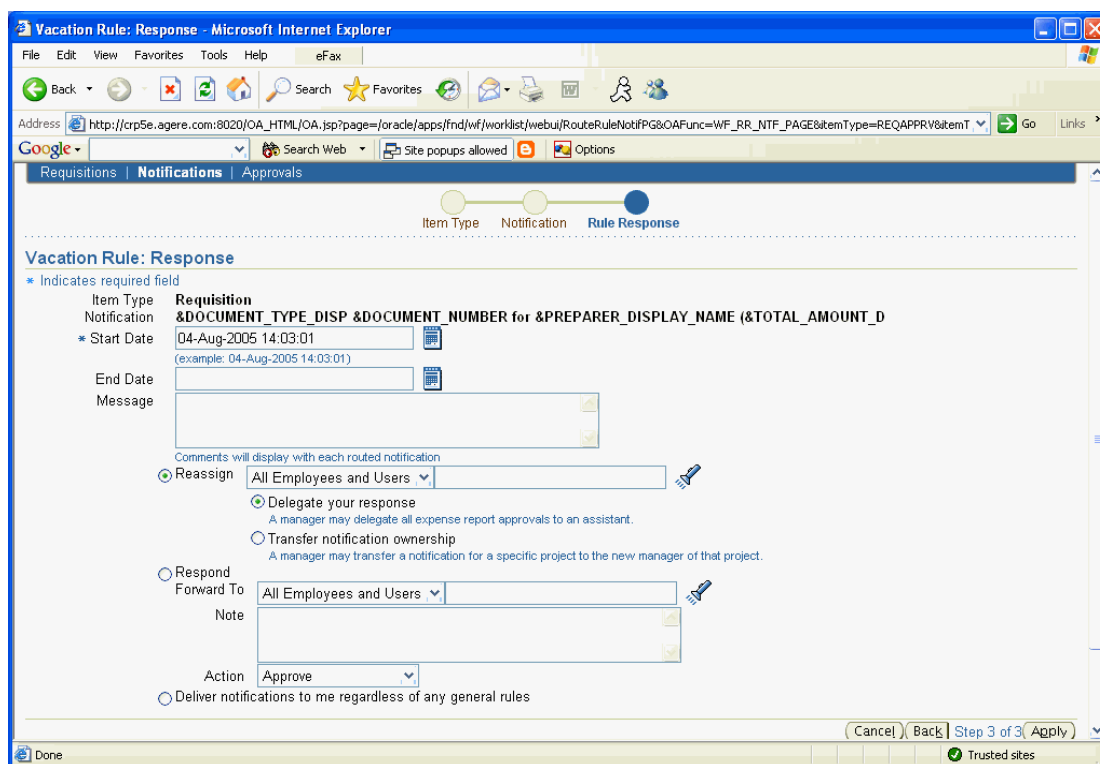


5. Select the appropriate Notification.

For requisition approvals, select a value of "&DOCUMENT_TYPE_DISP &DOCUMENT_NUMBER for &PREPARER_DISPLAY_NAME (&TOTAL_AMOUNT_DSP)".

The values displayed in the Notification list represent the subjects of the notifications that you receive.

6. Click (B) Next.



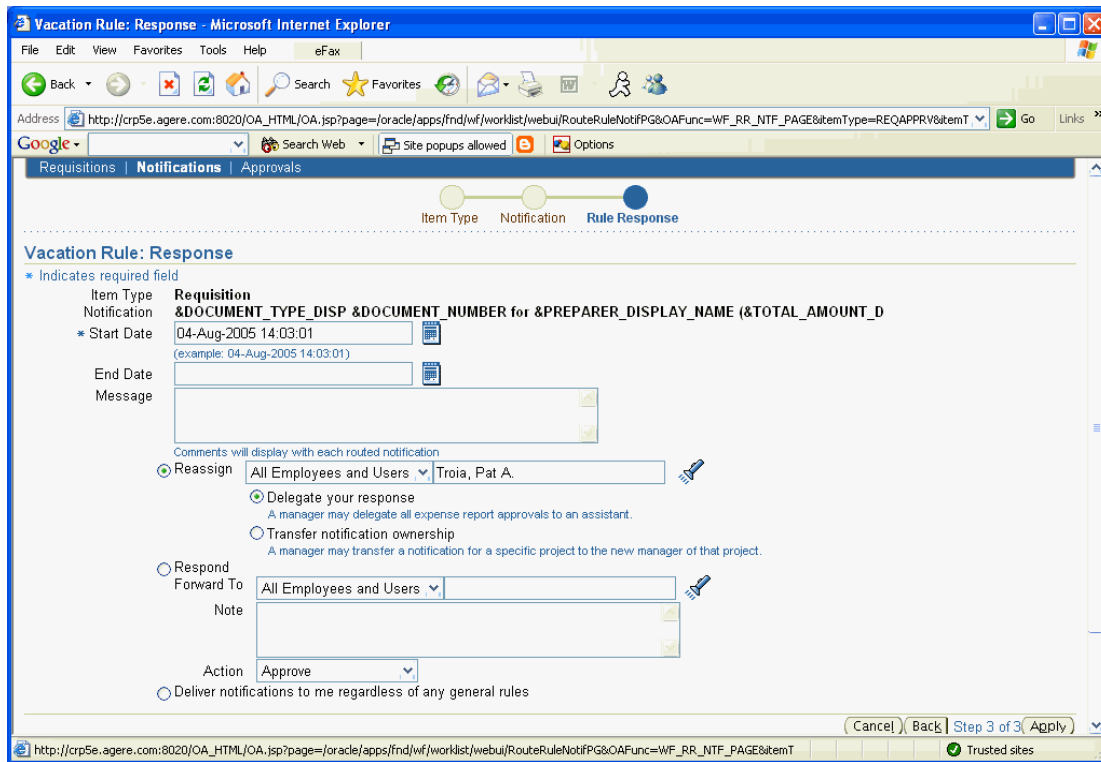
7. Enter an appropriate Start Date and End Date.

The system will automatically begin forwarding your notifications on the start date and time entered and it will stop forwarding your notifications on the end date and time specified.

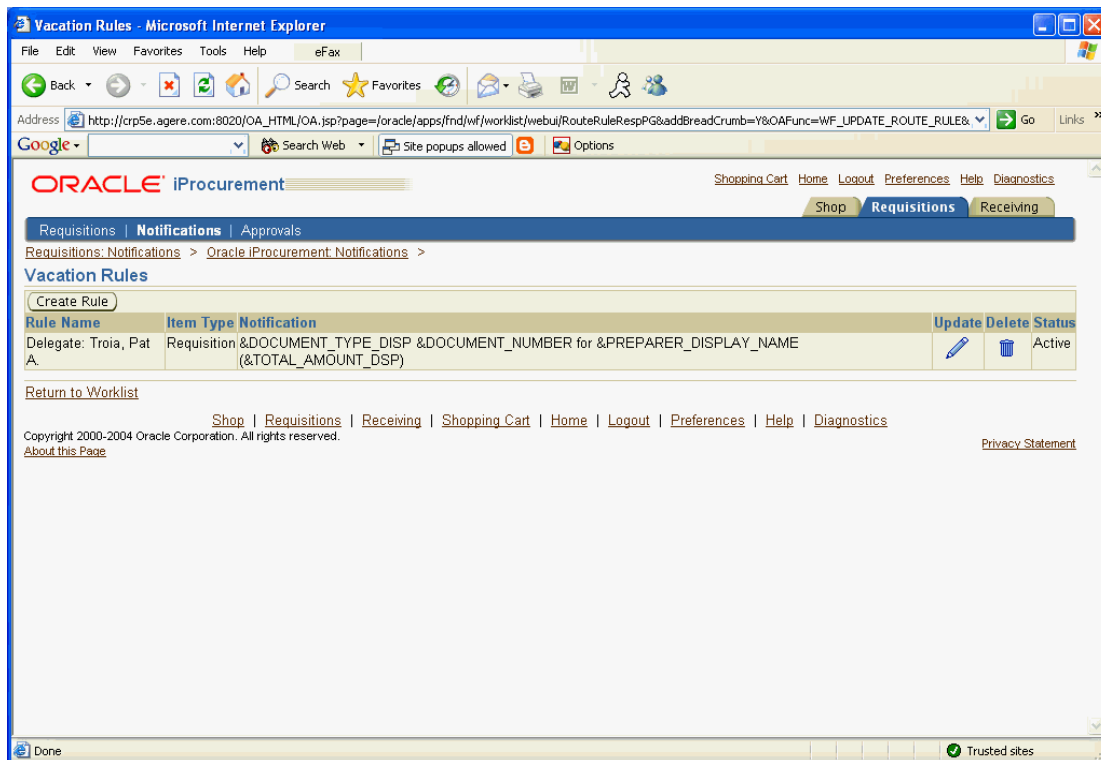
8. Enter a message for the approver if desired.
9. Click the Reassign radio button.
10. Enter an appropriate user to whom you would like your notifications forwarded.
11. Select to either Delegate your response or Transfer the notification ownership.

Delegating your response provides the new approver of this requisition with the same dollar authority as yourself.

Transfer notification ownership simply forwards the notification to the new approver. The new approver's dollar approval authority will still be their normal dollar approval authority (not yours).

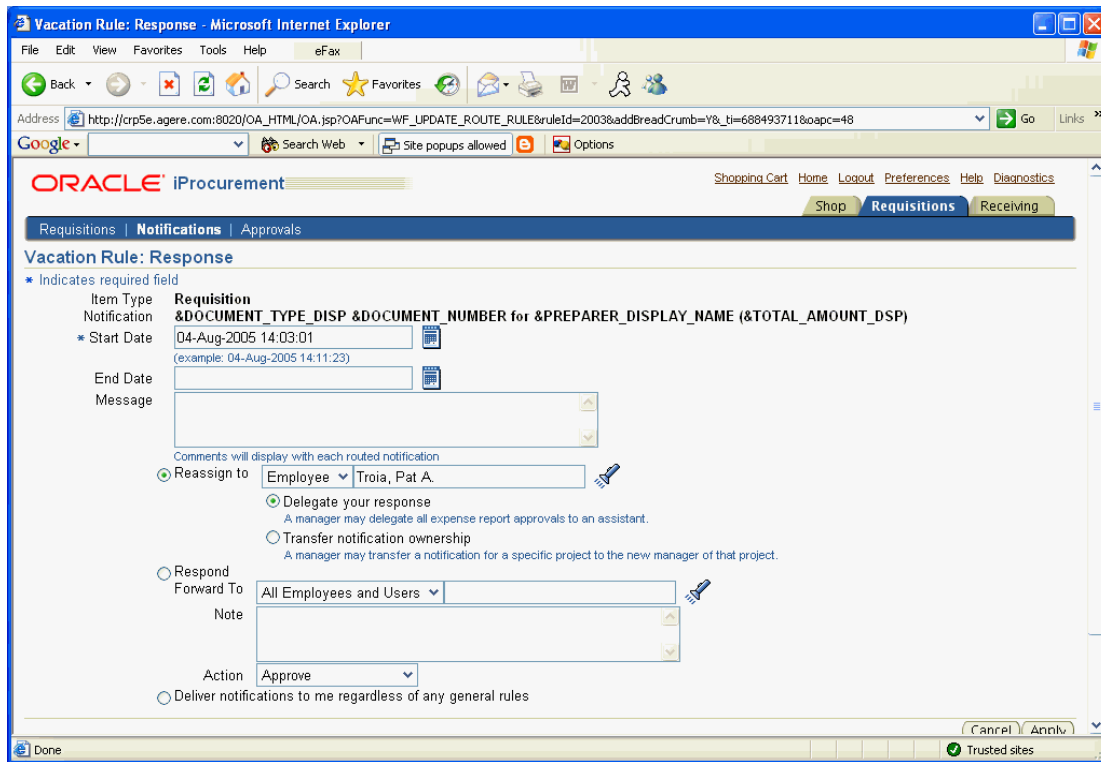


12. Click (B) Apply.

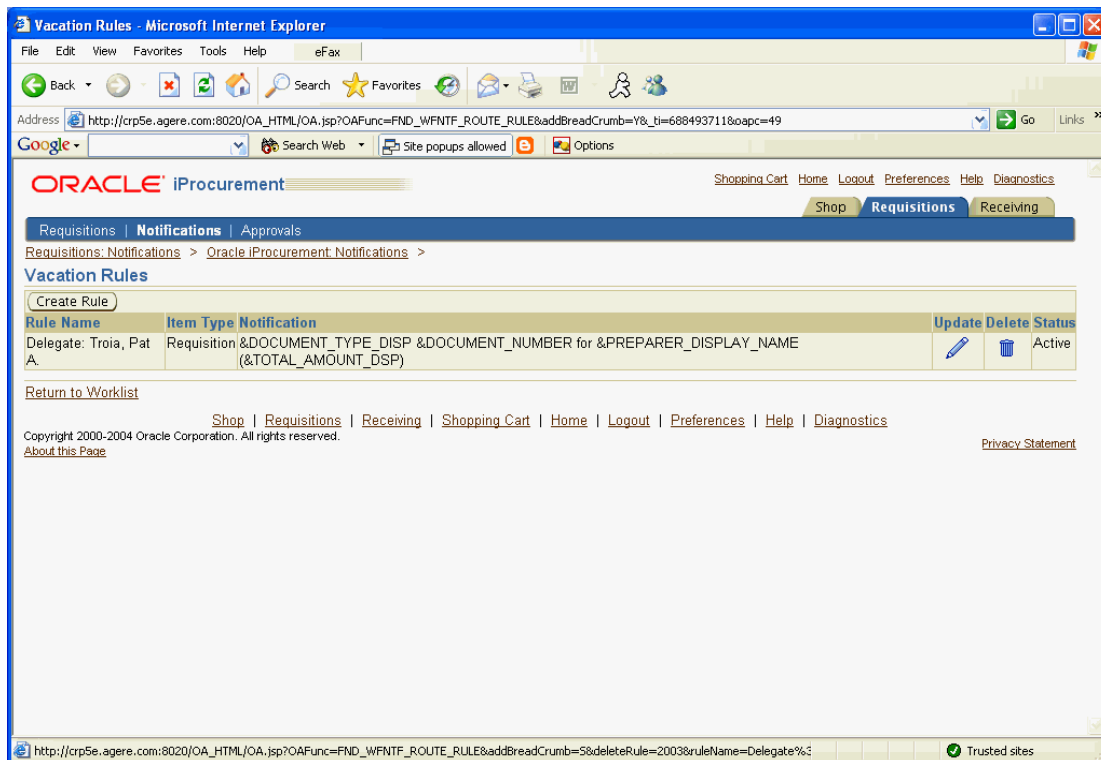


End of activity.

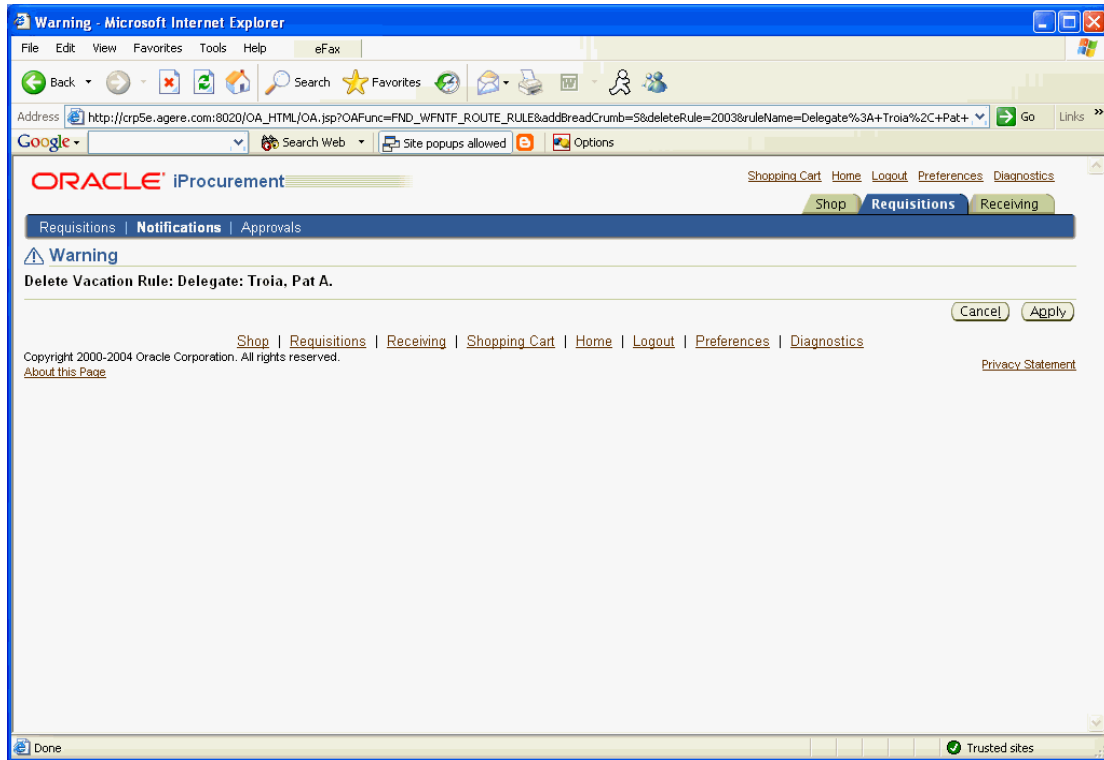
13. Click the (I) Update pencil for the appropriate rule.



Goto task #7



14. Click the (D) Delete trash can for the appropriate rule.



15. Click (B) Apply.

End of activity.

