

Release 12 Procurement – Professional Buyer’s Work Center

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Abstract

Exciting things are happening to the Procurement Suite in Release 12! Contracts, services and sourcing have all come together in a coordinated fashion in the Buyer’s Workbench. The Buyer’s Workbench was completely redone using the new “Swan Interface” to bring the purchasing user out of the forms world and into the 21st century. See the new user interface along with the integration of the Procurement Suite and a review of related Release 12 new features and functionality.

Where are we with Release 12?

Oracle announced the release of the initial version (12.0.0) of Release 12 in January 2007. Since then there have been five roll-up patches (RUP) and one “critical patch collection” or CPC patches that have been made public. Initially, the patching strategy was for a quarterly RUP which was observed until RUP4 which included an associated technology stack patch. RUP5 really wasn’t a RUP because it only applied to the Financial and Human Resources product families, which led to the patch being referred to as CPC patches. RUP6 was released in November 2008 and the sense is that 12.1 is close to being released since the Release Control Documents (RCD’s) have already been published to MetaLink (MetaLink Note ID: 561580.1).

Each RUP is cumulative in nature in that when RUP4 is applied, then all the patches for all the previous RUP’s are included and applied. Additionally, the Release 12 RUP’s contain the Release 11i Critical Patch Updates (CPU) security patches which eases the task of maintaining a current status for Release 12 environments.

Architecturally, Release 12 has been developed with a new look and feel which is referred to as the “Swan User Interface”. The underlying technology of the “Swan User Interface” is a shift in forms technology away from the professional forms which have existed for decades in favor of the OAFramework forms which are sometimes referred to as Java or HTML forms. Table 1 contains a count of form functions for each version of both Release 11i and Release 12 which shows a dramatic rise in OAFramework forms and a flatlined number of professional forms across the E-Business Suite footprint.

	11.5.9	11.5.10.2	12.0.0	12.0.4	12.0.6
Professional Forms	5697	6791	7011	7206	7173
OAFramework Forms	4715	11082	16525	16503	16544

New Procurement Features for Release 12

MetaLink Doc. ID: 404152.1 contain links for all the Release Content Documents (RCD’s) for all the Release 12 product families. RCD’s contain documentation on new features in a given release. The only cautionary note is that sometimes Oracle will highlight features and functionalities as “new” only to find out that some of those features and functionalities were introduced in prior releases. Given that caveat, there are many new features provided in Release 12 Procurement, but there are a few notable features that deserve highlighting and discussion.

As was pointed out in the previous section, Oracle is shifting their forms technology away from the Professional Forms in favor of the new “Swan User Interface” and OAFramework (HTML or Java) forms. Oracle’s investment in the new forms technology isn’t relegated to the development of new applications; there are several key Procurement forms that have been redeveloped in the new forms technology. Table 2 contains a list of OAFramework forms associated with the Purchasing Super User responsibility.

Subledger Accounting Forms	Setup: Purchasing Options	Setup: Receiving Options	Professional Buyer’s Work Center (*)	Setup: Hazard Classes
Setup: UN Numbers	Setup: Quality Inspection Codes	Setup: Line Types	Setup: Document Types	Setup: Document Styles
Setup: Tax	Setup: Profile Management	Setup: Contract Terms	Setup: Tolerances and Routings	Setup: Commodities
Setup: Job Category Association	Setup: Cost Factors	Setup: Control Purchasing Periods	Setup: Expense Account Rules	Manage Suppliers (*)

(*) Discussed in later sections

Several of the new forms can be attributed to integration with new applications such as E-Business Tax and Subledger Accounting; however, it is interesting to see that Oracle is choosing to redevelop some of the setup forms rather than invest in further professional forms modifications. That suggests that if a professional form requires some threshold number of hours to enhance, that Oracle is choosing the new technology over the old which suggests that the OAFramework forms may be a foundational technology for upcoming Fusion applications.

There are a couple of other new notable features are worth highlighting. It is now easier to communicate attachments and documents with suppliers and there is also an easier means to develop and deploy PDF and RTF templates for various purchasing documents.

Multi-Org Access Control (MOAC)

One of the new features for Release 12 Procurement is the advent of the new Multi-Org Access Control (MOAC). MOAC allows application users to access multiple operating units without having to change responsibilities. In previous releases of E-Business Suite, responsibilities were striped at the operating unit level which meant that if an Oracle Purchasing user needed to create transactions in a different operating unit, they were forced to change their responsibility – MOAC has removed that restriction.

Oracle has developed the logic for MOAC in all the major transactional forms and most of the concurrent programs for Oracle Purchasing. This logic detects the presence of the MOAC settings and then offers up a pick list or drop down menu showing the operating units that either the user or responsibility has access. There are two settings or functions that stimulate the MOAC pick lists and/or drop down menus and that is a combination of Oracle Human Resources (HR) security profiles and FND profile options.

Security profiles have long been a part of the Oracle HR security mechanism. These profiles actually utilize Oracle Label Security as its underlying architecture and technology. Oracle Label Security acts similarly to data instance sets which are used in defining access to applications and forms that utilize Oracle User Management roles. Both features provide the ability to specify a subset of data (for MOAC it is operating unit) that only certain users or responsibilities can access. This erects a logical security boundary that transcends physical table and tablespace boundaries that are found within the database. In the context of MOAC, the Oracle HR security profile will define the logical security boundary by grouping a set of operating units which can then be related to either a user or a responsibility through the special MOAC profile options.

There are a couple of tricks to defining an Oracle HR security profile for MOAC and that is to be sure to exclude the top level business group and to use the “Security Type” called “Secure organizations by organization hierarchy and/or organization list”. When the business group is excluded it removes an extraneous entry from the MOAC pick list/drop down menu. Further, the recommended “Security Type” is really the only one that applies to MOAC since the others are either “view only” or involved with lower level inventory organizations.

Once the Oracle HR security profile has been defined and saved for MOAC, there is a concurrent program that must be run before the security profile is active and that concurrent program is called “Security List Maintenance”. This concurrent program actually performs the underlying bind or defines the logical security boundaries within the database. There is a parameter that will be pointed to the name of the Oracle HR security profile that was defined for MOAC and then caution needs to be taken to specify “One Named Security Profile” for the parameter named “Generate Lists for”. If this parameter value is not selected, then there is a risk that all security profiles will be regenerated which could have undesired effects especially for those companies that have Oracle HR installed and in production.

After the “Security List Maintenance” is run for the MOAC security profile, then there are some MOAC profile options that will be pointed to the MOAC security profile for either a particular user or a particular responsibility. There are three profile options that work in concert together to stimulate the MOAC functionality within Oracle Purchasing:

- MO: Default Operating Unit
- MO: Operating Unit
- MO: Security Profile

MO: Operating Unit specifies the default operating unit that a user wants to be presented if MOAC is not defined. Hierarchically, this MO profile option is at the bottom of the food chain, so if MOAC isn't specified in the other MO profile options, then a user can specify a singular default operating unit here.

MO: Security Profile is where the Oracle HR security profile that was defined for MOAC is specified. This is the integration between the logical security boundary established for MOAC (i.e. multiple operating units) and a specific user or responsibility access. After the security profile is saved in this profile option, the next time that user logs in or that responsibility is accessed, then the Oracle Purchasing forms and reports will provide the MOAC pick list/drop down menu to allow an operating unit to be selected. Over time, one feature can become annoying especially if a majority of transactions are entered to one particular operating unit out of the list of operating units. That is where the third MOAC profile option comes into play.

MO: Default Operating Unit specifies the dominant operating unit out of the list of MOAC operating units. If this profile option is set, the behavior of the forms and reports change in that upon entry to the form/report, the operating unit field is already filled in with this operating unit. The MOAC pick list/drop down menu is still there and can still be accessed, but now it only needs to be accessed for transactions against operating units not specified in MO: Default Operating Unit. This provides efficiency to the user who enters a majority of transactions against one dominant operating unit in that it is automatically populated to the form/report.

Professional Buyer's Work Center

The Professional Buyer's Work Center is a masterpiece of integration that brings together requisitions, orders, Sourcing, Procurement Contracts, Deliverables and Suppliers into a one-stop shop for buyers. Prior to Release 12, buyers had to shell out and go to different forms to access each of these functional areas, but now these functional areas are just a tab click away.

Built into each of these functional areas, Oracle has delivered a powerful search mechanism where seeded searches are active plus buyers are allowed to personalize their own searches to help them find their requisitions, orders, et al quickly and efficiently.

Personalized views can either be created from scratch or duplicated from a seeded search. Various columns can be added to the personalized search to provide more granular filtering of buyer's data. Column names can be changed on a view by view basis and column totaling can be specified for numeric columns (i.e. amounts) as long as the totaled column is the last column in the list of view columns. Additionally, columns can be reordered; however, columns can't be moved up and down, they can only be removed and added back to the column list. Personalized views can be developed by the buyer for requisitions, orders, agreements and suppliers.

The requisition tab is what Oracle calls the "Demand Workbench" and is where requisitions can be approved, rejected, changed and split all in one place. At the end of each requisition there are three icons, "Replace with items from catalog", "Replace items from favorites" and "Split". The first two icons have to do with managing viable replacement items from either existing catalogs or from a favorites list. The last icon takes the requisition and splits it into multiple requisitions based on the items that have been requested. Directly above the list of requisitions, there is a line called "Select Requests" where an "Add", "Return", "Reassign", "Cancel Split" and "Save Split" buttons appear. The "Add" button acts like the AutoCreate function where the selected requisition is added to the Document Builder window on the right hand side of the Demand Workbench form. "Return" is the equivalent of a buyer rejection where the requisition is returned to the requestor. "Reassign" does just that, it provides the ability to reassign the selected requisition(s) to another buyer. Lastly, the two "split" buttons provides directional functionality to any split requisitions that have been created.

As mentioned above, the "Add" button works with the "Document Builder" window which provides for a quick autocreation of a purchase order from the requisition(s) being "added". The buyer can choose the supplier, agreement, supplier site, operating unit and document style to be used with the new purchase order being created. Within the "Document Builder" window there are three buttons which are very intuitive, "Clear", "Update" and "Create". The "Clear" button is used to clear the contents from the "Document Builder" window. The "Update" button expands the "Document Builder" window into an entire form where the buyer can provide a different supplier, supplier site, agreement, currency and document style for the purchase order. Further the purchase order line number can be updated to some other value and the entire line can be removed from the purchase order creation as well. It should be noted that the "Add" button will not work until an operating unit is specified in the "Document Builder" window.

Once the "Create" button is hit, then control passes over to the "Orders" tab which is where the buyer manages purchase orders. Displayed at the top of the Orders tab is a dropdown menu which provides for the following:

- Add Contract Terms
- Delete
- Manage Tax
- Place On Hold
- Duplicate with or without attachments
- View requisition
- View PDF

All of the above are actions that can be taken to more fully define the purchase order, manage the order's status or view the order. One of the new Release 12 features that were mentioned previously is a stronger integration with Adobe PDF document style. The "View PDF" action shells out to Adobe Acrobat and displays the order per the PDF document style template. Another key integration for the order is with the Oracle Procurement Contracts functionality. Oracle Procurement Contracts provides rich functionality whereby contract templates can be developed and applied directly to the purchase order. Non-standard

contract clauses can be added on an as needed basis and included in the order approval process. PDF and MSWord integration is provided for viewing procurement contracts. One other important integration that is accessed through this dropdown menu and that is the integration with the new E-Business Tax application. In Release 12, Oracle extracted all the tax logic out of the subledgers and placed it in E-Business Tax which now provides a single source of transactional tax information, support for tax reporting, tax accounting and tax reconciliation processes.

Progressing across the Work Center tabs, the next tab is “Agreements” which basically has the same functionality as the “Orders” tab except that it manages blanket agreements and contract purchase agreements. As was mentioned previously, the buyer cannot change standard contract clauses that are applied through a contract template; however, non-standard clauses can be entered. Further, Oracle provides a comparison feature that will compare the non-standard clause text to the standard clause text and “redline” the differences. Only Contract Administrators have the necessary access to be able to revise standard contract clauses and contract templates. Oracle also provides a feature whereby an external contract document or a supporting document can be uploaded through the “Manage Contract Documents” function and attached to a particular agreement.

Contract Deliverables can be managed through the “Deliverables” tab. Deliverables are any type of document that the buyer is expecting from the supplier or other external parties. A typical example of a Deliverable is a proof of insurance form or maybe an OSHA certification of some sort. Oracle provides the capability to add these deliverables with reminder criteria. The reminders are supported by a full range of date and time options and repeatability considerations as well.

“Negotiations” is the integration point between the buyer and Oracle Sourcing. Through Oracle Sourcing, buyers can create events which can be auctions, requests for quote, requests for interest and bidding conferences. Suffice it to say that Oracle Sourcing provides a very rich suite of functionality whereby it might take veritable reams of paper to articulate it with certainty. It is sufficient to note that this integration point resides in the Work Center and that the Oracle Sourcing documentation should be reviewed for more in depth information.

Lastly, there is a new Supplier Management form for Release 12 which can be accessed through the “Supplier” tab. Being developed in the OA Framework forms technology allows not only for the esthetic appeal from the “Swan User Interface”, but also allows a new setup mapping technique that has been referred to as “bread crumb path” and “train”. The “bread crumb path” found on the left hand side of the form gives a quick summary of what Supplier information has been setup and which information remains to be setup. The “bread crumb path” also provides an implied sequence to the setups as derived from the scripted order of the individual setup tasks.

Conclusion

Release 12 has provided quantum leaps forward in design and functionality for Oracle Purchasing with the Professional Buyer’s Work Center being one of the centerpieces. This new tool provides the buyer community the wherewithal to be more efficient through increased throughput derived from a high degree of functional integration and information availability. The intuitive nature of the “Swan User Interface” coupled with new forms techniques such as “bread crumb paths” allow buyers to spend less time on forms navigations and more time on managing corporate spend.

Chuck Kennedy, MBA CISA OCP of Solution Beacon has over 13 years of experience with Oracle E-Business Suite and the underlying technology stack. He is a Solution Architect with knowledge and experience in Oracle Releases 12 and 11i with a focus on E-Business Suite security, system administration, financials, supply chain management, procurement and human resources. His combination of technical and functional expertise provides a unique blend of business acumen which is highly leveraging to the Oracle E-Business Suite user community. He has participated in the authoring of the Release 12 Primer book and his article “Administration of Users, Roles and Responsibilities in

Release 12: When Technologies Collide” was published in the OAUG Insight magazine (Winter 2008). He has presented at various regional and national user conferences. Chuck can be reached at ckennedy@solutionbeacon.com.