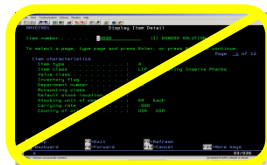




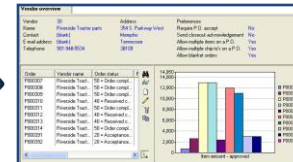
Moving Forward with XA

PM Purchase Requests and Electronic Requisition Approval

Denise Luther
Senior Consultant, Technical Services

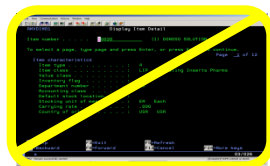


Moving Forward with XA

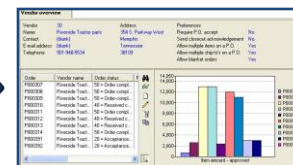


Agenda

- Purchase Request Overview
- Electronic Requisition Approval Introduction
- eReq Demo
- Questions



Moving Forward with XA



Purchase Requests

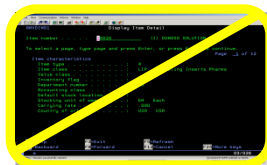
- New Procurement Mgmt object (7.7 PTF/7.8)
- Ties together requisitions
 - Like a header
 - Handle requisitions as a group
 - Makes entering and tracking requisitions easier

Purchase Request

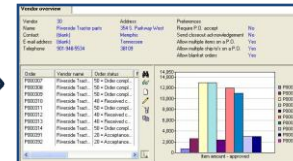
Buyer: John Doe Priority: 1

Whs: Atlanta Contract: 123

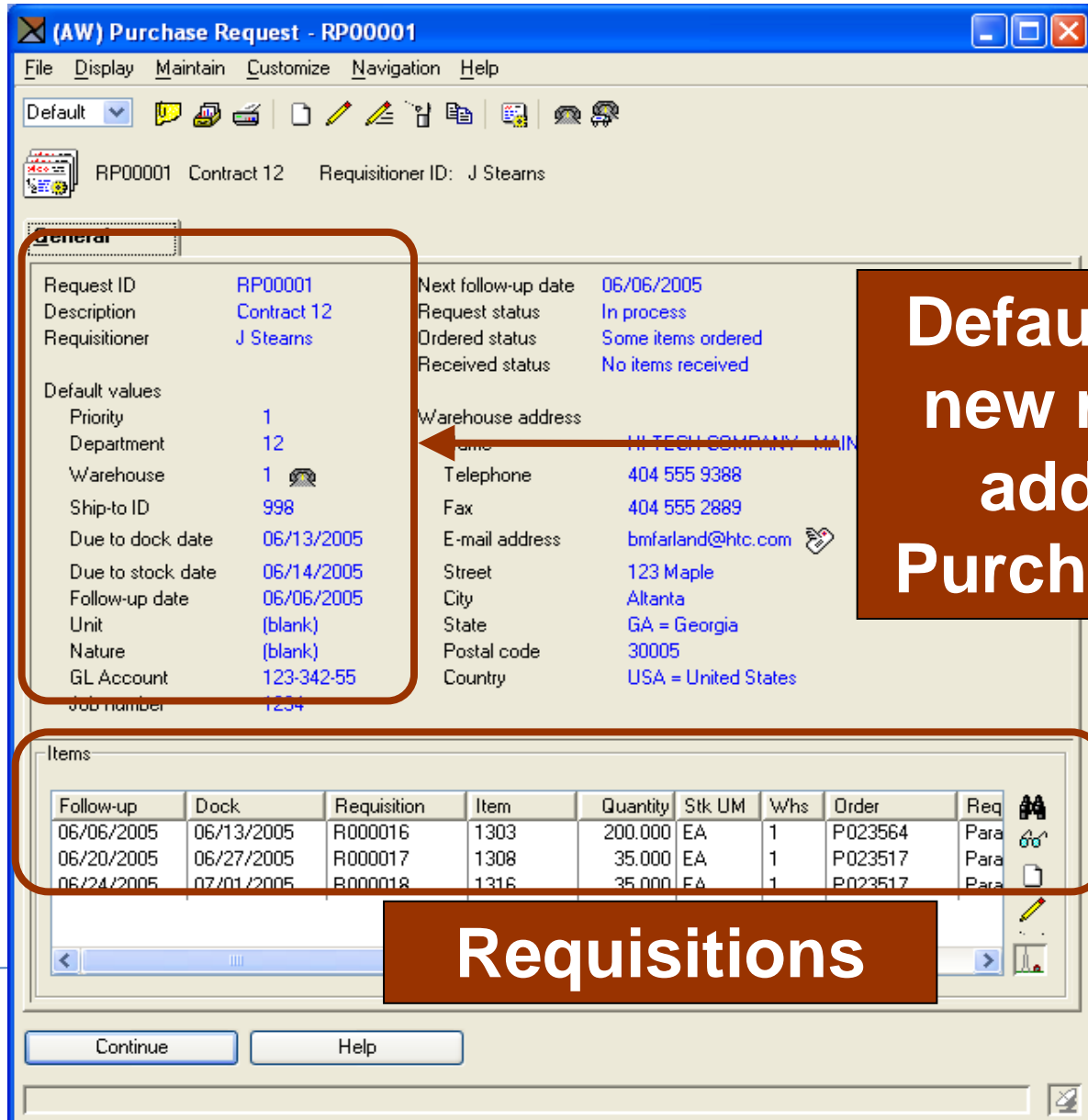
REQ	ITEM	QTY	DATE
1	123A	10	Apr 1
2	2546	44	Apr 8
3	5938	48	Apr 8
4	2019	14	Apr 1
5	3876	87	Apr 6



Moving Forward with XA



Purchase Request Header

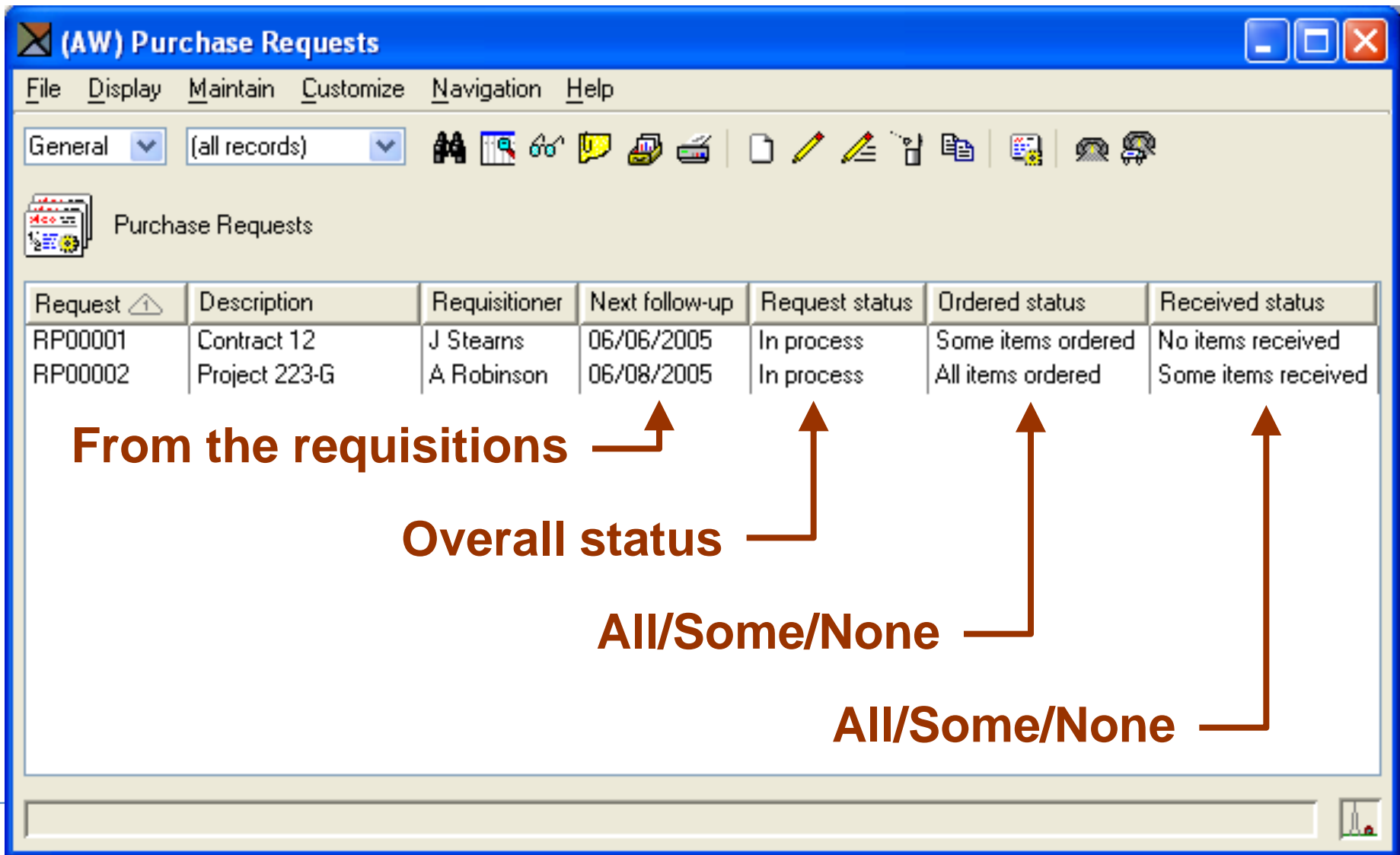


Default values for new requisitions added to this Purchase Request

Follow-up	Dock	Requisition	Item	Quantity	Stk UM	Whs	Order	Req
06/06/2005	06/13/2005	R000016	1303	200.000	EA	1	P023564	Para
06/20/2005	06/27/2005	R000017	1308	35.000	EA	1	P023517	Para
06/24/2005	07/01/2005	R000018	1316	35.000	EA	1	P023517	Para

Requisitions

Purchase Request Status



(AW) Purchase Requests

File Display Maintain Customize Navigation Help

General (all records)

Purchase Requests

Request	Description	Requisitioner	Next follow-up	Request status	Ordered status	Received status
RP00001	Contract 12	J Stearns	06/06/2005	In process	Some items ordered	No items received
RP00002	Project 223-G	A Robinson	06/08/2005	In process	All items ordered	Some items received

From the requisitions →

Overall status ↗

All/Some/None ↗

All/Some/None ↗



Purchase Requests

(AW) Purchase Requests

File Display Maintain Customize Navigation Help

Gen... Purchase Request details
 Attachments
 Maintenance History
Purchase Request Items
 Warehouse Address options ▶
 Warehouse options ▶
 Compare

Supplier	Next follow-up	Request status	Ordered status	Received status
ms	06/06/2005	In process	Some items ordered	No items received
inson	06/08/2005	In process	All items ordered	Some items received

Purchase Request Items



Moving Forward with XA



Requisitions

(AW) Purchase Request Items RP00001 Contract 12 Requisitioner ID: J...

Purchase Request items are requisitions

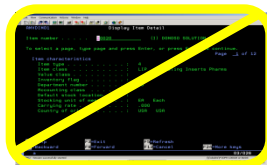
RP00001 Contract 12 Requisitioner ID: J Stearns

Follow-up	Dock	Requisition	Item	Quant...	Stk UM	W/hs	Order	Reque-
06/06/2005	06/13/2005	R000016	1303	200.000	EA	1	P023564	Parago
06/20/2005	06/27/2005	R000017	1308	35.000	EA	1	P023517	Parago
06/24/2005	07/01/2005	R000018	1316	35.000	EA	1	P023517	Parago

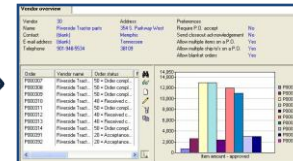


Purchase Request Benefits

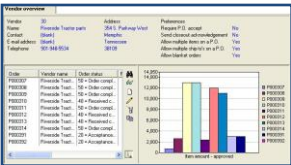
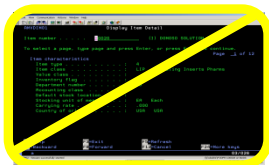
- Purchase Request is for the requisitioner, not the buyer
 - No change to buyer's process
- Manage and track requisitions as a group
 - For order, job, contract
- Quick glance shows status
 - Drill-down to see more



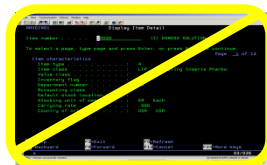
Moving Forward with XA



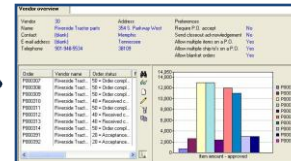
- Electronically route requisitions for approval
- Approval via PowerLink or email
- Multiple categories of items
- Multiple levels of approval
- Complete history of transaction



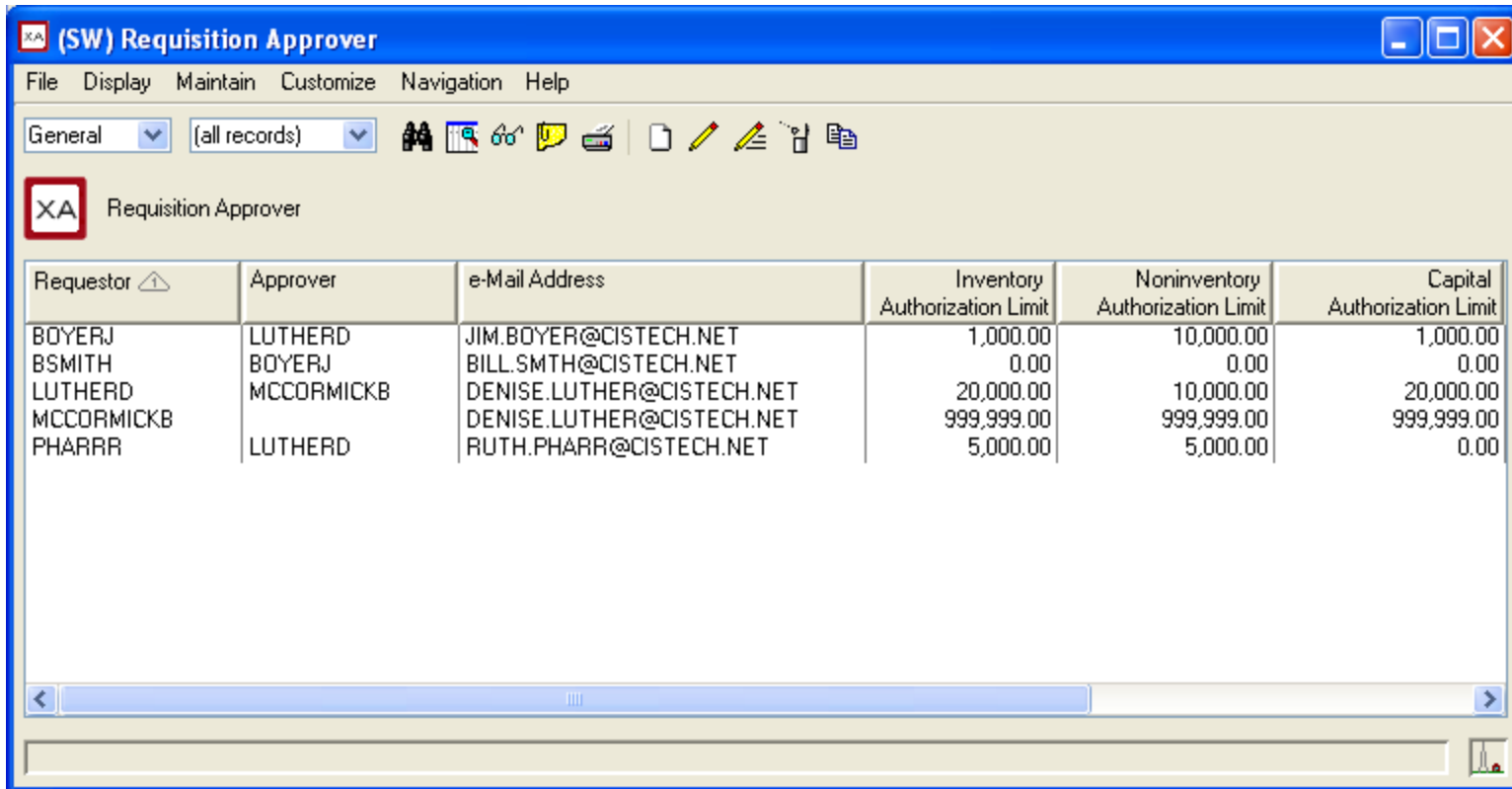
eReq Demonstration



Moving Forward with XA



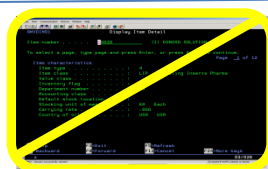
Requestor/Approvers



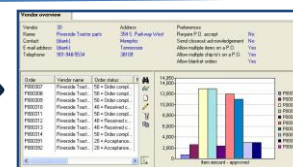
The screenshot shows the 'XA Requisition Approver' window with a menu bar (File, Display, Maintain, Customize, Navigation, Help) and a toolbar. Below the toolbar, the window title is 'XA Requisition Approver'. The main area contains a table with the following data:

Requestor	Approver	e-Mail Address	Inventory Authorization Limit	Noninventory Authorization Limit	Capital Authorization Limit
BOYERJ	LUTHERD	JIM.BOYER@CISTECH.NET	1,000.00	10,000.00	1,000.00
BSMITH	BOYERJ	BILL.SMTH@CISTECH.NET	0.00	0.00	0.00
LUTHERD	MCCORMICKB	DENISE.LUTHER@CISTECH.NET	20,000.00	10,000.00	20,000.00
MCCORMICKB	LUTHERD	DENISE.LUTHER@CISTECH.NET	999,999.00	999,999.00	999,999.00
PHARRR	LUTHERD	RUTH.PHARR@CISTECH.NET	5,000.00	5,000.00	0.00

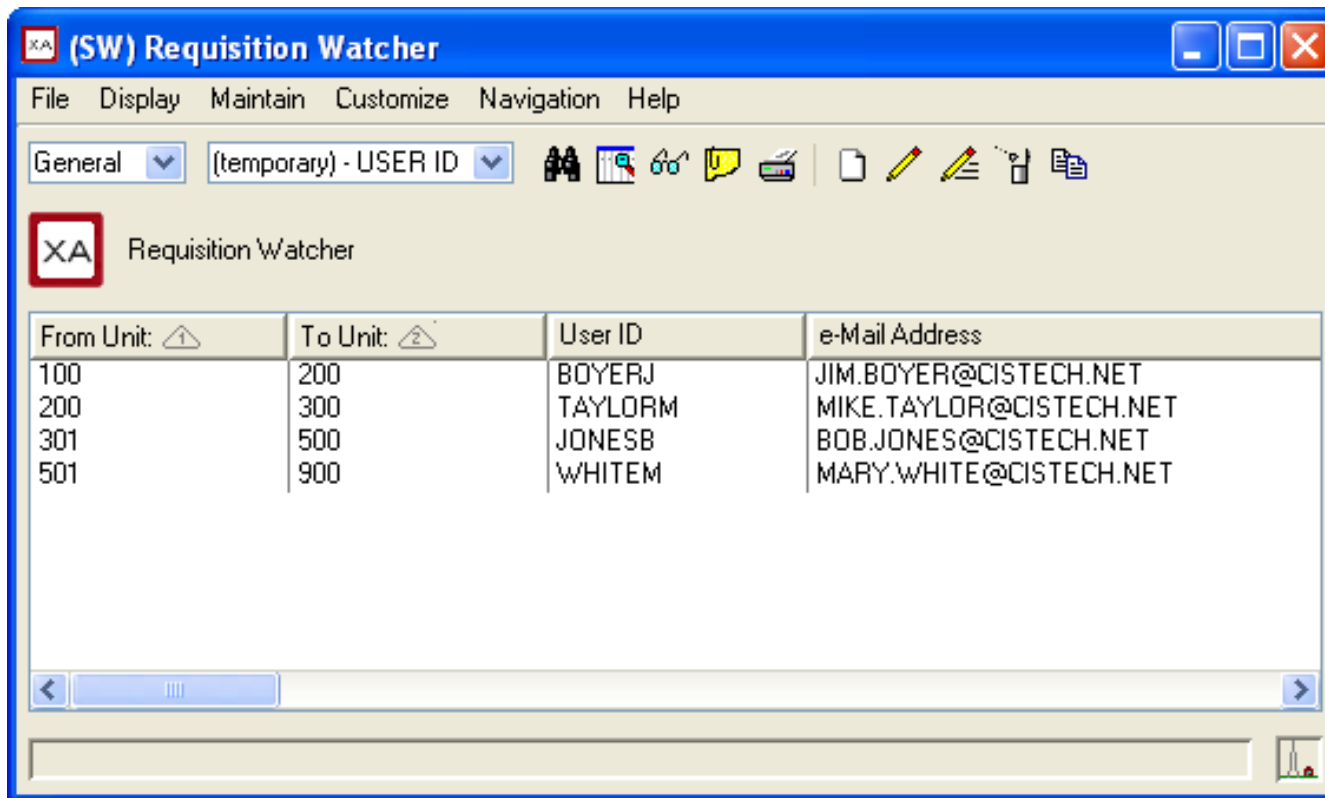
- Set Limits by Type
 - Inventory, Non-Inventory and Capital Projects



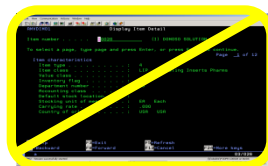
Moving Forward with XA



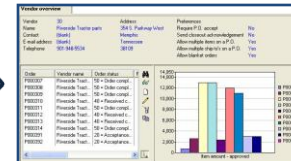
Watchers



Receive **authorization** notification for Dept (Unit) Range



Moving Forward with XA



Requestor initiates approval

(SW) Requisitions

File Display Maintain Customize Navigation Help

Approval (all records)

Requisitions

Req uision 1	Item	Item description	Quantity	Extended price	Requisition Status	Authorized Date	Approving User	Capital Proj...	Unit
R000001	1305	Motherboard Chi...	10,000.000	645,000.0000	1 = Awaiting Approval	11/12/2008	LUTHERD /LUTHERD		1008
R000002	1305	Motherboard Chi...	500.000	32,250.0000	1 = Awaiting Approval	10/27/2008	LUTHERD /MCCORMICKB		1002
R000003	1306	Motherboard Chi...	1,200.000	142,860.0000	1 = Awaiting Approval				1003
R000004	1105	Mouse	50,001.000	599,511.9900	1 = Awaiting Approval		BOYERJ /LUTHERD		01
R000005	1107	Keyboard Ergo	50.000	550.0000	0 = Price Quote Requested				01
R000006	1107	Keyboard Ergo	20.000	220.0000	= Incomplete				01
R000008	BOX1	Box #100 Antacid							01
R000009	BOX1	Box #100 Antacid							1008
R000010	BOX1	Box #100 Antacid							1008
R000011	BOX1	Box #100 Antacid							1008
R000012	MAG	Magnesium Stear...							1008
R000013	MAG	Magnesium Stear...							1008
R000014	MINT	Mint Flavor							1008
R000015	MINT	Mint Flavor							1008
R000016	SIMETHICONE	Simethicone	9.99						1008
R000017	SIMETHICONE	Simethicone	9.99						1008
R000018	SUGAR	Sugar							1008
R000019	WATER	Water Purified							1008
R000020	PKG1	Bottle #2455 Ant...							1008
R000021	PKG1	Bottle #2455 Ant...							1008
R000022	WATER	Water Purified							1008
R000023	PKG1	Bottle #2455 Ant...							1008
R000024	MAG	Magnesium Stear...							1008
R000025	MINT	Mint Flavor							1008
R000026	SIMETHICONE	Simethicone	9.99						1008
R000027	SUGAR	Sugar							1008
R000028	1207	Drive, 24x Max Cd						U/N	1008
R000033	1208	Motherboard, 40...							1008
R000035	1208	Motherboard, 40...							1008
R000037	PTM9	Conductive Copp...							1008
R000038	MSC132	Hardener							1008
R000039	MSC371	Ink Pad Printing, ...							1008
R000040	MTL999-1	Shield, Serialized							1008
R000041	PKB225	Bag, 12x32 Ldpe...							1008
R000042	SERV-MACH	Service-mach	10						1008
R000043	1104	Speakers							1008
R000045	1204	Drive, Floppy							1008
R000046	PD6433111430	Filter, Medium							1008

(SW) Change Requisition - R000005

R000005 1107 Keyboard Ergo 1 Abc Technologies - Main Whse

Template: (none)

Item: 1107 Keyboard Ergo

Item description: Keyboard Ergo

Quantity: 50.000

Extended price: 550.0000

Requisition Status: Awaiting Approval

Authorized Date: Price Quote Requested

Approving User: Awaiting Approval

Capital Project Number: Approved Not Authorized

Unit: Authorized to Buy

Nature: Incomplete

Stocking UM: EA = Each

Due to dock date: 05/25/2000

Due to stock date: 05/25/2000

Order: [Empty]

Unit price: 11.0000

Requisitioner: BOYERJ

Create date: 04/28/2000

Warehouse: 1

Approve from PowerLink

(SW) Requisitions

File Display Maintain Customize Navigation Help

Approval (all records)

Requisitions

Req. Item	Item description	Quantity	Extended price	Requisition Status	Authorized Date	Approving User	Capital Proj..	Unit
R000001	1305 Motherboard Chi...	10,000.000	645,000.0000	1 = Awaiting Approval	11/12/2008	LUTHERD /LUTHERD		1008001
R000002	1305 Motherboard Chi...	500.000	32,250.0000	1 = Awaiting Approval	10/27/2008	LUTHERD /MCCORMIC...		1002001
R000003	1306 Motherboard Chi...	1,200.000	142,860.0000	1 = Awaiting Approval				1003001
R000004	1105 Mouse	50,001.000	599,511.9900	2 = Approved Not Authorized	01/18/2010	LUTHERD /MCCORMIC...		01
R000005	1107 Keyboard Ergo	50.000	550.0000	3 = Authorized to Buy	01/18/2010	BOYERJ		01
R000006	1107 Keyboard Ergo	20.000	220.0000	= Incomplete				01
R000008	BOX1 Box #100 Antacid	1,000.000	0.0000	4 = Rejected	12/06/2008	LUTHERD		01
R000009	BOX1 Box #100 Antacid					LUTHERD		100899
R000010	BOX1 Box #100 Antacid					LUTHERD		100899
R000011	BOX1 Box #100 Antacid					LUTHERD		100899
R000012	MAG Magnesium Stear...					LUTHERD		100899
R000013	MAG Magnesium Stear...							100899
R000014	MINT Mint Flavor							100899
R000015	MINT Mint Flavor							100899
R000016	SIMETHICONE Simethicone							100899
R000017	SIMETHICONE Simethicone							100899
R000018	SUGAR Sugar							100899
R000019	WATER Water Purified							100899
R000020	PKG1 Bottle #2455 Ant...							100899
R000021	PKG1 Bottle #2455 Ant...							100899
R000022	WATER Water Purified							100899
R000023	PKG1 Bottle #2455 Ant...							100899
R000024	MAG Magnesium Stear...							100899
R000025	MINT Mint Flavor							100899
R000026	SIMETHICONE Simethicone							100899
R000027	SUGAR Sugar							100899
R000028	1207 Drive, 24x Max Cd						U/N	100899
R000033	1208 Motherboard, 40...	1,000.000	418,040.0000	2 = Approved Not Authorized	10/27/2008			
R000035	1208 Motherboard, 40...	10.000	4,180.4000	= Incomplete				
R000037	PTM9 Conductive Copp...	1.000	118.0000	1 = Awaiting Approval				100899
R000038	MSC132 Hardener	0.305	10.3700	= Incomplete				
R000039	MSC371 Ink Pad Printing, ...	0.122	8.2960	= Incomplete				
R000040	MTL999-1 Shield, Serialized	605.000	7,260.0000	1 = Awaiting Approval				100899
R000041	PKB225 Bag, 12x32 Ldpe...	605.000	1,210.0000	1 = Awaiting Approval				100899
R000042	SERV-MACH Service-mach	100,000.000	250,000.0000	= Incomplete				
R000043	1104 Speakers	24.000	1,516.8000	1 = Awaiting Approval				100899
R000045	1204 Drive, Floppy	20.000	799.8000	= Incomplete				
R000046	PD6433111430 Filter, Medium	1,000.000	0.0000	= Incomplete				

(SW) Approve/Reject

Template: Default

Requisition: R000006

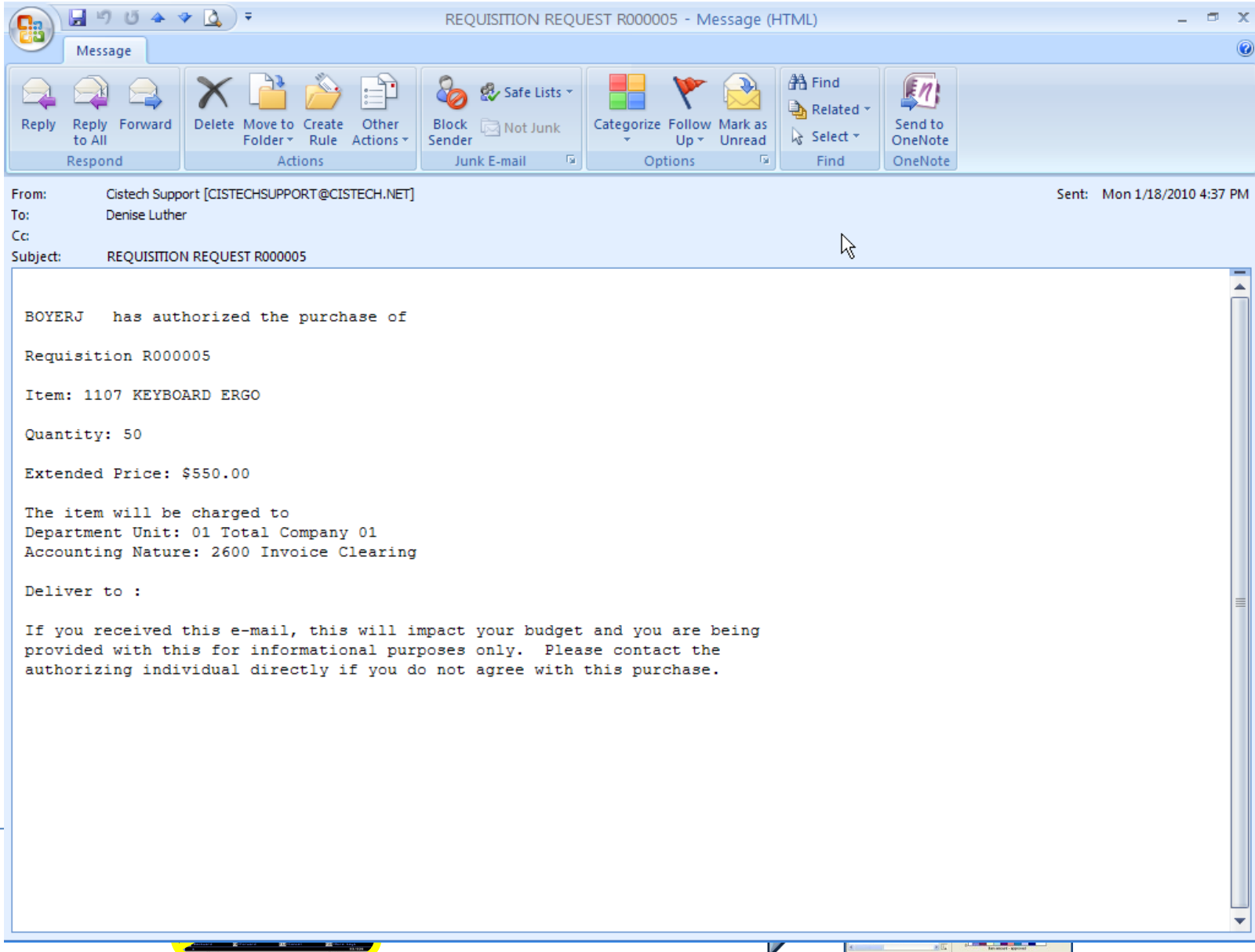
Approve/Reject Action: **Approve**

Current User: [User Name]

Auto advance

Continue Bypass Cancel Help

Watchers are notified



REQUISITION REQUEST R000005 - Message (HTML)

Message

Reply Reply Forward to All Respond Delete Move to Folder Create Rule Other Actions Block Sender Not Junk Junk E-mail Categorize Follow Up Mark as Unread Options Find Related Select Find Send to OneNote OneNote

From: Cistech Support [CISTECHSUPPORT@CISTECH.NET] Sent: Mon 1/18/2010 4:37 PM
To: Denise Luther
Cc:
Subject: REQUISITION REQUEST R000005

BOYERJ has authorized the purchase of
Requisition R000005
Item: 1107 KEYBOARD ERGO
Quantity: 50
Extended Price: \$550.00
The item will be charged to
Department Unit: 01 Total Company 01
Accounting Nature: 2600 Invoice Clearing
Deliver to :

If you received this e-mail, this will impact your budget and you are being provided with this for informational purposes only. Please contact the authorizing individual directly if you do not agree with this purchase.

Maintenance History

(SW) Requisitions

File Display Maintain Customize User Navigation Help

Approval (temporary)...

Req uestion 1	Requested vendor	Item	Item description	Quantity	Extended price	Requisition Status	Requisitioner	Authorized Date	Approving User
R000005		1107	Keyboard Ergo	50.000	550.0000	3 = Authorized to Buy	KEMPD	05/05/2011	GRINDLE
R000006	8				220.0000	3 = Authorized to Buy	LUTHERD	05/05/2011	LUTHERC
R000011	22				0.0000	3 = Authorized to Buy	MRP AUTO	12/01/2010	LUTHERC
R000017	22				0.0000	3 = Authorized to Buy	MRP AUTO	12/01/2010	LUTHERC
R000037	27				118.0000	3 = Authorized to Buy	LUTHERD	09/02/2010	LUTHERC
R000086	14				71.4300	3 = Authorized to Buy	LUTHERD	10/27/2008	BOYERJ
R000092	1207				585.0000	3 = Authorized to Buy	BOYERJ	12/07/2008	MCCORMI
R000093	1207				130.0000	3 = Authorized to Buy	BOYERJ	02/11/2010	BOYERJ
R000097	1207				135.0000	3 = Authorized to Buy	BSMITH	12/07/2008	BOYERJ
R000099	1207				110.0000	3 = Authorized to Buy	BSMITH	12/07/2008	BOYERJ
R000100	1207				1.200.0000	3 = Authorized to Buy	BOYERJ	12/07/2008	BOYERJ
R000122	1207							09/02/2010	LUTHERC
R000127	7							02/11/2010	GRINDLE
R000143	007000							03/02/2010	LUTHERC
R000184	16							11/17/2010	KEMPD
R000198	14							12/01/2010	LUTHERC
R000201	11							01/12/2011	LUTHERC
R000205	16							02/01/2011	KEMPD
R000207	16							02/01/2011	GRINDLE
R000211	14							05/04/2011	LUTHERC
R000214	16							05/05/2011	LUTHERC
R000215	16							05/09/2011	LUTHERC
R000216	16	1003	Pc, 300 Mhz, Desk					05/09/2011	LUTHERC

10,003,433.000 | 95,124.4300

(SW) Requisition Maintenance History - R000005

File Display Maintain Customize Navigation Help

General (all records)

Date	Time	Transaction description (derived)
05/05/2011	11:37:03 AM	Change Requisition
05/05/2011	11:35:48 AM	Change Requisition
05/04/2011	9:32:50 PM	Change Requisition
05/04/2011	9:27:38 PM	Change Requisition
05/04/2011	9:26:56 PM	Change Requisition
03/11/2010	11:12:53 PM	Change Requisition
02/11/2010	1:59:32 PM	Change Requisition
01/27/2010	2:30:52 PM	Change Requisition
01/25/2010	3:11:26 PM	Change Requisition
01/25/2010	10:22:59 AM	Change Requisition

(SW) Maintenance History - Change Requisition, R000005, 05/05/2011, 11:37:03 AM

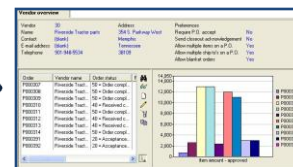
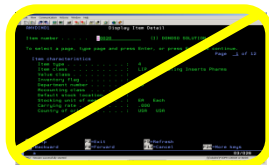
File Display Maintain Customize Navigation Help

Default

Change Requisition R000005 05/05/2011 11:37:03 AM

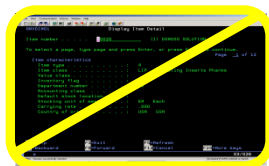
Attribute	Before	After
Approving user	KEMPD /GRINDLEYJ	GRINDLEYJ
Authorized Date		05/05/2011
Requisition Status	1 = Awaiting Approval	3 = Authorized to Buy

Continue Help

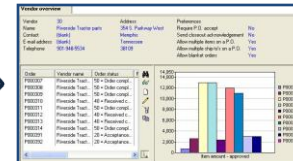


E-Req Benefits

- Increased efficiency of requisition process
- Increase timeliness of process
 - Get needed parts quickly, without expediting
- Increased visibility of status
- Increase control of requisitions cost

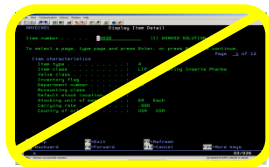


Moving Forward with XA

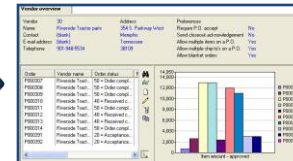


E-Req Implementation

- Software price: \$5,500
- One day of remote installation and education support
- XA R7.7
- Procurement Management
- Integrator



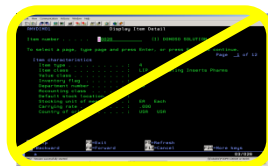
Moving Forward with XA



Questions ?

Thank you !

Denise.Luther@cistech.net



Moving Forward with XA

