

JD Edwards EnterpriseOne Requisition Self Service



PRODUCT HIGHLIGHTS

- Streamline employee ordering
- Enforce spending policy
- Reduce procurement costs
- RSS Entry & Receipts Delegation
- UX One role-based pages for Self Service Manager

Oracle's JD Edwards EnterpriseOne Requisition Self Service simplifies the employee requisitioning process and frees up purchasing departments for more strategic tasks by putting requisitioning tasks in the hands of employees. Using Requisition Self Service, approvals can be routed automatically to the appropriate approvers, which allows your purchasing staff to focus on procuring products or services that require special handling.

The Issues

The employee is an infrequent software user who has not been trained on the purchasing product – Most employees have not been trained on the full functionality of the procurement system. They require an easy and intuitive search and selection process to create a requisition for a product or service.

Employees order incorrect, non-standard, or non-preferred supplier products and services – Employees may search many different supplier websites to find the product they believe they require. Management would prefer to focus the search of their employees to specific suppliers for commodities or services.

Managers and buyers lack a consistent review and approval process – The correct product, commodity, or service information is critical to selecting the appropriate approval routing process. Products and services commodity naming standards also can provide downstream effective analysis of commodity spend patterns.

Buyers need the correct requisition information to accurately create the purchase order – Products and services requested by the user need to have the correct purchasing information such as assigned buyer as well as the correct accounting information to expense the product or service to the correct department and account.

The employee is unable to track the progress of the requisition or approved purchase order – Employees will often enter a requisition but then lose visibility to its approval status or related purchase order status. This can result in frequent employee inquiries to the purchasing department for updates on the status of their requisition.

The Solution: Automated Employee Requisitions

JD Edwards EnterpriseOne Requisition Self Service automates employee requisitioning through an easy self-service web-shopping system. Employees create, manage, and track their own orders in an intuitive web interface, while purchasing retains central control. JD Edwards EnterpriseOne Requisition Self Service ensures that purchasing policies and preferred suppliers and pricing agreements are reflected in every transaction.

FEATURE/FUNCTION HIGHLIGHTS

Usability

- Delegation of RSS Entry & Receipts
- Familiar web-shopping interface
- Simple three-step requisitioning process
- Expandable requisitions
- Requisition summary page
- Manage requisitions page
- Punch-out to supplier hosted catalogs
- Hierarchical category structure

Integration

- Perform matching validation between receipts, purchase orders, and invoices
- Seamlessly integrate to all JD Edwards applications including:
 - Manage requestors from Human Resources
 - Charge requisitions to Projects for full project accounting
 - Requisition items related to assets with Capital Asset Management

Requisition Management

- Full lifecycle visibility
- Order and line cancellations
- Issue change requests
- Return items to suppliers
- Receive items

Approval Management

- Dynamic approval workflow
- Line level approvals
- Email-based approvals
- Workflow reassignment

Policy Enforcement

- Real-time budget checking
- Multiple accounts per line
- Preferred supplier enforcement rules
- Contract compliance

Also, UX One role-based pages for Self Service Managers enable them to easily access, review, and act upon valuable information, thereby ensuring an efficient and effective employee requisitioning process.

Streamline Employee Ordering

Improve employee productivity, control buying, and eliminate error-prone paper processes with self-service ordering.

Web-Shopping Interface Ensures Rapid Deployment and Adoption – JD Edwards EnterpriseOne Requisition Self Service gives employees an intuitive web-shopping interface. Users discover the products and services they need within a hierarchical category structure, with punch-out links to preferred supplier websites for catalog searching. A web-based architecture enables requesters to place, track, or copy orders from any web browser, without requiring any additional software to be installed on the desktop. The result is your employees have immediate access to the solution via an interface they can easily use.

Content Control Guides User Choice – JD Edwards EnterpriseOne Requisition Self Service enables purchasing departments to control the products and services that employees have access based on organization and responsibility. Users can “punch-out” to supplier-hosted catalog sites, add items to their shopping cart, and then return for checkout and approval. Catalog Content may be restricted based on the agreement with the supplier. For items and services with multiple preferred suppliers, the hierarchical structure provides information about all suppliers associated to a category, making it easy for employees to make compliant purchasing decisions regardless of the supplier.

Requester Fulfillment Tracking and Change Management Saves Purchasing Staff Resources – Purchasing departments are inundated with status calls, wasting valuable staff time. JD Edwards EnterpriseOne Requisition Self Service’s complete requisition management enables employees to track their requisitions from initiation to payment. Employees can delegate their RSS entries and receipts due to change in responsibility or leave of absence. Requesters can track approvals and delivery status, change, or cancel line items, and acknowledge receipt of goods from any web browser. This frees your purchasing department from routine tracking, receiving and change management; purchasing agents are also free to focus on high-value tasks.

Special Requests put Purchasing in Control – Often an employee needs goods or services that are not available in the predefined Category structure. With JD Edwards EnterpriseOne Requisition Self Service’s Special Request feature, Purchasing can easily manage and control these non-standard purchases. Special Requests collect key information, such as preferred suppliers, category, and price (if available). Additional fields such as the vendors part number as well as the ability to add attachments ensures non-category items are processed just as efficiently as categorized orders.

Enforce Spending Policy

Approval and Accounting Enforcement Ensure Compliance – JD Edwards EnterpriseOne Requisition Self Service builds policy enforcement into every transaction, from requisition through payment. Configurable approval management ensures that every purchase receives the correct approvals required by policy for the amount, requester, department, and project. Use both serial and parallel approval paths or add

approvers and/or reviewers as needed during the approval process. Features such as line level approval and email-based approvals allow requisitions to be approved anytime and anywhere. Support for key accounting methods including budget, encumbrance, and projects ensure fiscal control. Administrators can set up desired tolerances for commitments against a budget. Requesters can commit against a budget for procurement activities and determine the availability of funds in real-time. With built-in policy enforcement, routine compliance is improved, and exceptions are identified for management by purchasing professionals.

Supplier Pricing and Correct Terms Flow into Every Order – JD Edwards

EnterpriseOne Requisition Self Service ensures that the prices and terms of supplier agreements are reflected in every order. Supplier agreements can be set up once and used across the enterprise. The system also helps your buying organization comply with supplier agreements by directing users to preferred suppliers and allowing you to aggregate demand for quantity discounts. With JD Edwards EnterpriseOne Requisition Self Service, the savings you negotiate with suppliers consistently reach your bottom line.

Reduce Procurement Costs

Lower procurement costs by reducing transaction overhead, controlling maverick spending, and realizing the full value of your preferred supplier agreements.

Process Automation Lowers Transaction Costs – JD Edwards EnterpriseOne Requisition Self Service dramatically cuts procurement transaction costs by automating the purchasing resource-intensive requisitioning process. End users (i.e., employees) can easily initiate requisitions for the goods and services they need without costly intervention from purchasing professionals. Once requisitions are approved, they can automatically be placed on purchase orders and issued to suppliers. JD Edwards EnterpriseOne Requisition Self Service supports the full spectrum of supplier enablement capabilities, from paper-based faxing through full EDI or cXML-based integration using PeopleSoft Enterprise Direct Connect. Electronic creation and transmission of orders is how JD Edwards EnterpriseOne Requisition Self Service drives down transaction costs.

Easy Single Point of Purchase Controls Maverick Spending – JD Edwards EnterpriseOne Requisition Self Service combats maverick spending by providing an easy-to-use single point of entry for all requisitions. The solution is so convenient that it is easier for requestors to buy through it than go outside the solution. Control over available content from approved suppliers and application of spending policy via configurable workflow reins in maverick spend. JD Edwards EnterpriseOne Requisition Self Service captures detailed spend information so not only are your policies automatically enforced, your spend data is available for advanced analysis that will yield future savings opportunities.

Contract and Price Compliance Realizes Preferred Supplier Savings – When converting approved requisitions to purchase orders, it is essential to reference agreements and preferred supplier to maximize savings. JD Edwards EnterpriseOne Requisition Self Service working seamlessly with JD Edwards Procurement and Subcontracts Management can automatically identify agreements. This “auto sourcing” uses requisition information such as supplier, item, and business unit to identify the

appropriate agreement to reference. Exceptions are flagged for buyer intervention in cases where the system cannot “auto source” a requisition. Requesters take advantage of negotiated price discounts, volume rebates, and preferred supplier savings without becoming purchasing experts and the purchasing department never leaves money on the table.

Solution Integration

This module is designed to be integrated with these JD Edwards EnterpriseOne products and families across your operations using common tools and a Pure Internet Architecture:

- Financial Management
 - Accounts Payable
 - Advanced Cost Accounting
- Order Management
 - Advanced Pricing
 - Agreement Management
 - Sales Order Management
- Manufacturing
 - Requirements Planning
 - Quality Management
- Supply Chain Execution (Logistics)
 - Inventory Management
 - Transportation Management
 - Warehouse Management
- Project Management
 - Project Costing
 - Project and Government Contract Accounting (PGCA)
- Capital Asset Management
- Apparel/Attribute Management

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