

More4apps

Functional Impact Document

Requisition Wizard

Created By: More4apps

Creation Date: 29 August 2019

Version: 4.0

Version Date: 14 April 2021

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Release 9.0.09 – 14/04/2021

This release includes various enhancements and performance improvements.

1.1. Project Details

Version: 9.0.05

Date: 04/02/2021

The dependency on Destination Type is removed. Project details can now be entered irrespective of the Destination Type selected.
The projects list of values will depend on the selected destination organization.

1.2. Requisition Import Parameter

Version: 9.0.03

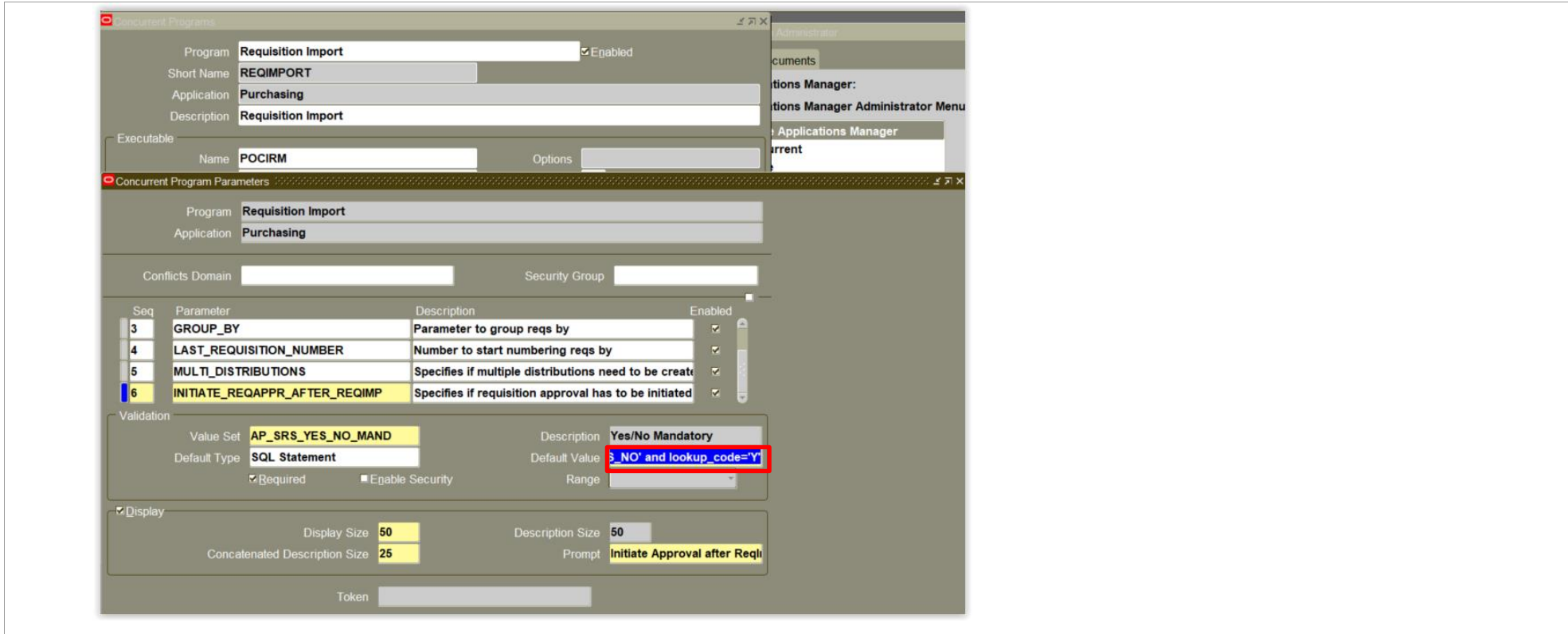
Date: 21/01/2021

Remove the default value of 'No' in the parameter 'Initiate Approval after ReqImport'. It will now respect the default in the Requisition Import.

[Cobain 12.1.3] Requisition Import

Requisition Import

| | | |
|-----------------------------------|-----------|-----|
| Import Source | ReqWizard | ... |
| Import Batch ID | 1125442 | |
| Group By | All | ... |
| Last Requisition Number | | |
| Multiple Distributions | Yes | ... |
| Initiate Approval after ReqImport | Yes | ... |



The screenshot shows the configuration for a concurrent program named 'Requisition Import'. The program is enabled and has a short name of 'REQIMPORT' and application of 'Purchasing'. The executable name is 'POCIRM'. Below this, the 'Concurrent Program Parameters' section is visible, containing a table of parameters:

| Seq | Parameter | Description | Enabled |
|-----|-------------------------------|---|-------------------------------------|
| 3 | GROUP_BY | Parameter to group reqs by | <input checked="" type="checkbox"/> |
| 4 | LAST_REQUISITION_NUMBER | Number to start numbering reqs by | <input checked="" type="checkbox"/> |
| 5 | MULTI_DISTRIBUTIONS | Specifies if multiple distributions need to be create | <input checked="" type="checkbox"/> |
| 6 | INITIATE_REQAPPR_AFTER_REQIMP | Specifies if requisition approval has to be initiated | <input checked="" type="checkbox"/> |

Below the table, the 'Validation' section is configured with the following details:

- Value Set: AP_SRS_YES_NO_MAND
- Description: Yes/No Mandatory
- Default Type: SQL Statement
- Default Value: 'NO' and lookup_code='Y'
- Required:
- Enable Security:

The 'Display' section is also configured:

- Display Size: 50
- Description Size: 50
- Concatenated Description Size: 25
- Prompt: Initiate Approval after Reql

Release 8.1.12 – 11/11/2020



This release includes various bug fixes, enhancements, and performance improvements.

1.3. Generate Accounting Key Flexfield Combinations

Version: 8.1.10

Date: 27/10/2020

Descriptive Flexfield attribute values are passed to the Account Generator Workflow to generate the Charge, Accrual and Variance Account combinations.

1.4. Performance Improvements

Version: 8.1.8

Date: 22/09/2020

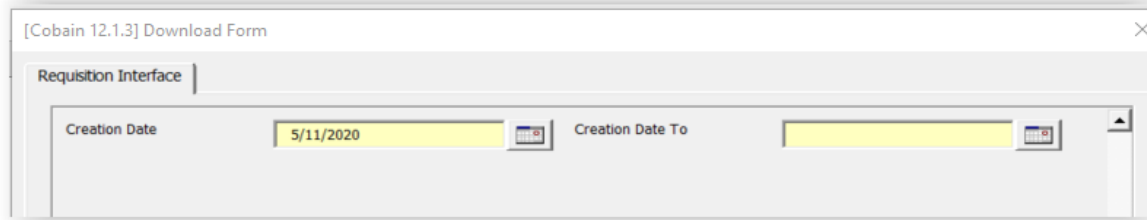
Improve performance when validating certain fields.

1.5. Interface Download Form Default Date

Version: 8.1.7

Date: 27/08/2020

In the Requisition Interface Download form, the Creation Date from date defaults to today's date.



1.6. Partial Sourcing Default Information

Version: 8.1.6

Date: 26/08/2020

When using partial sourcing option, supplier site and purchase document information will not default values if the supplier has been changed from the initial source default.

1.7. Projects Information

Version: 8.1.5

Date: 25/08/2020

Implemented Projects for destination type of Inventory if Project Reference is enabled in the system configuration.

Release 8.0.27 – 29/04/2020

This release includes various bug fixes, enhancements, the new branding and colors.

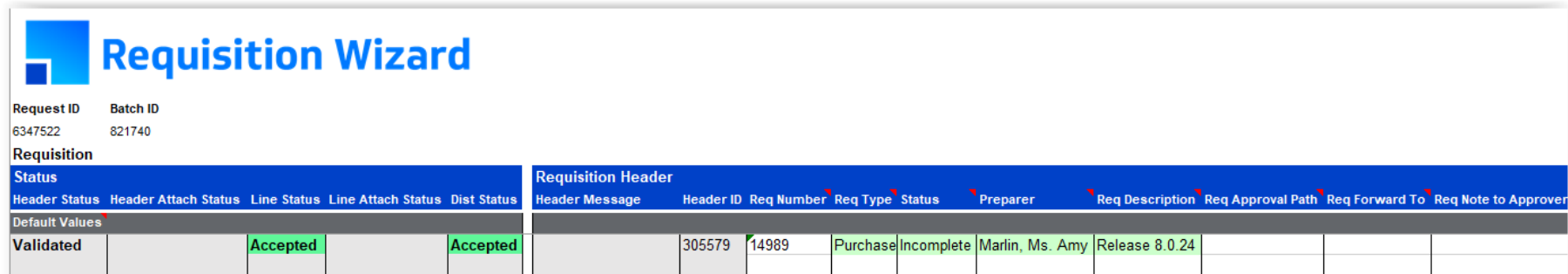
1.1. New More4apps Branding – New Logo and Colors

Version: 8.0.24

Date: 29/04/2020

New More4Apps brand applied. This will have no functional impact and is purely a cosmetic update.

Existing templates with previous styles will work with this version, please note however, the colors may change in these sheets when invoking Wizard functionality.



Requisition Wizard

Request ID: 6347522 Batch ID: 821740

| Status | | | | | Requisition Header | | | | | | | | | |
|----------------|----------------------|-------------|--------------------|-------------|--------------------|-----------|------------|----------|------------|-----------------|-----------------|-------------------|----------------|----------------------|
| Header Status | Header Attach Status | Line Status | Line Attach Status | Dist Status | Header Message | Header ID | Req Number | Req Type | Status | Preparer | Req Description | Req Approval Path | Req Forward To | Req Note to Approver |
| Default Values | | | | | | | | | | | | | | |
| Validated | | Accepted | | Accepted | | 305579 | 14989 | Purchase | Incomplete | Marlin, Ms. Amy | Release 8.0.24 | | | |

1.2. Source Organization

Version: 8.0.23

Date: 25/03/2020

The field Source Organization is no longer mandatory for Internal Requisitions where Source Type is Inventory. If no organization is entered, the Requisition Import program will derive from the source organization set up in Inventory.

Release 8.0.7 – 16/10/2019

This is a major release of Requisition Wizard which has significant changes in Modes and performance updates.

It is advisable to undertake comprehensive testing before migrating to this release.

Whilst we at More4Apps have tried to maintain the same look and user interaction, some functionality has been modified. You **cannot** use your previous template/worksheets in this new version as the structure of the Wizard has changed with the introduction of Modes and data layout changes.

Note: Any macros used to write data to your current Worksheet will need to be updated. If More4Apps previously supplied your macros please log a support call to have your macros updated.

This release enables templating to better control access to functions with the Wizard and the default behaviour of columns. System Administrators may wish to take advantage of implementing this. More information can be found [here](#):

1.1. New Color Scheme

Version: 8.0.7

Date: 16/10/2019

More4Apps has implemented a new color scheme, see below for an example:

| Requisition | | | | | Requisition Header | | | | | | | | | | |
|-----------------------|----------------------|-------------|--------------------|-------------|--------------------|-----------|------------|----------|--------|----------|------------------|-------------------|----------------|----------------------|-----------------|
| Header Status | Header Attach Status | Line Status | Line Attach Status | Dist Status | Header Message | Header ID | Req Number | Req Type | Status | Preparer | Req Description | Req Approval Path | Req Forward To | Req Note to Approver | Emergency PO Nu |
| Default Values | | | | | | | | | | | | | | | |
| Validated | | Accepted | | Accepted | | 383496 | 35319 | Purchase | Approv | Stock, M | Com3_Sourcing_10 | | | | |

1.2. New Wizard Ribbon

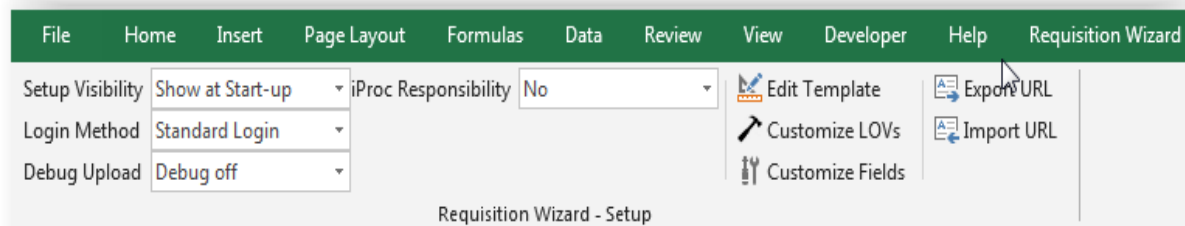
Version: 8.0.7

Date: 16/10/2019

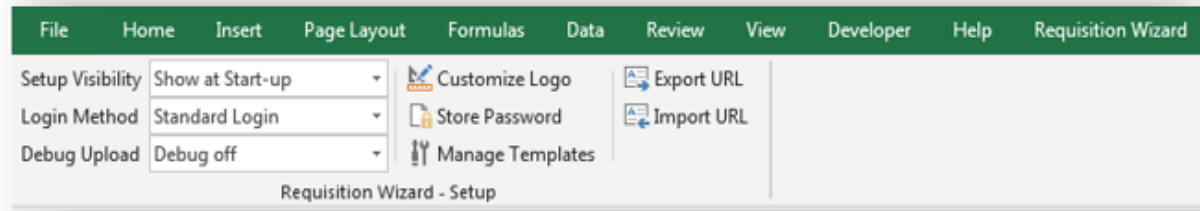
The ribbon has been updated to improve usability.

Requisition Wizard – Setup

Old



New

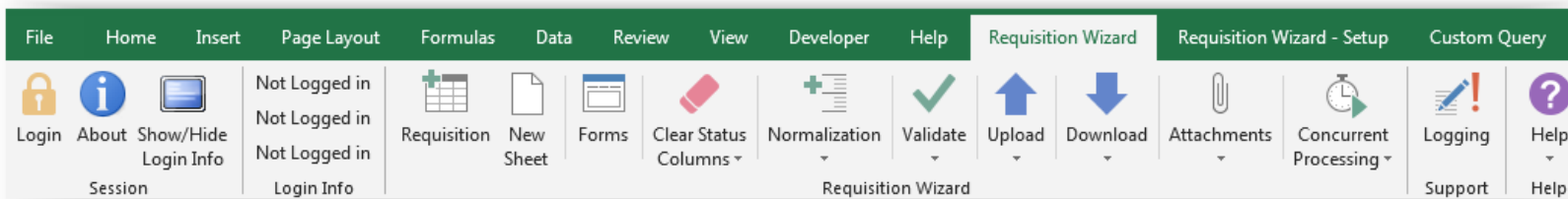


Note:

- iProc Responsibility option has been replaced by 'iProcurement' mode.
- Customize Logo allows you to change the More4Apps logo to your Company logo.
- Store Password enables you to password protect the spreadsheet.
- Manage Templates replaces Customize Fields (refer to note 1.8 below for details)

Requisition Wizard

New Ribbon



Note:

- New mode icon to access the two new modes - Requisition or iProcurement.

- DFF's icon is replaced by a DFF tab in the header, line and distribution forms.
- Clear Status Columns icon allows 'Clear Status Columns' only or 'Clear Status Columns and IDs'.
- Validate and upload functions are streamlined into Validate and Upload icons.
- Concurrent program functions and delete data from interface are classified under Concurrent Processing.
- A new Logging Support icon, when activated will record upload information for support purposes.
- The Help icon will direct you to user instructions and product details.
- Preview Autosource and Sourcing Rule options have been replaced by a new action column, namely Autosource in the template.

1.3. New Mode Functionality

Version: 8.0.7

Date: 16/10/2019

Modes:

- The introduction of modes in the Wizard separates specific iProcurement functionalities from that of existing standard EBS professional form.
- The default is 'Requisition' mode. Use this mode to create requisitions if you do not require iProcurement defaulting.
- In iProcurement mode, the column layouts in Requisition Lines and Sourcing sections are designed to enable sourcing and related information to be defaulted based on predefined Smart Forms and Catalog Supplier Item fields.

1.4. Smart Form

Version: 8.0.7

Date: 16/10/2019

When a Smart Form is selected, the associated line type, category, description and sourcing document details are defaulted.

| Requisition Lines | | | | | Sourcing | | | Requisition Lines | | | | | | | | |
|-------------------|---------|----------|------------|------------------------|-------------------|-----------------|---------------|-------------------|------|----------|----------------|-----------------------|---------------------------------------|-----|---------------|-------|
| Line Message | Line ID | Line Num | Smart Form | Catalog Supplier Item | Document Type | Document Number | Document Line | Line Type | Item | Revision | Category | Item Long Description | Description | UOM | Line Quantity | Price |
| | | | | Patents and Trademarks | Contract Purchase | 4514 | | Consulting | | | SERVICES.LEGAL | | Legal Services for patents and traden | | | |

Note: Smart Form functionality is not supported in Release 11. Once you delete the Smart Form column from the template, you can continue to use the Wizard in R11.

1.5. Catalog Supplier Item

Version: 8.0.7

Date: 16/10/2019

This functionality has the feature of defaulting associated information from the Catalog Supplier Item without the user having to manually enter the data on the sheet.

The profile options below control this feature and have to be set to 'Yes':

More4Apps: RW Enforce Catalog Defaulting

More4Apps: RW Enable Document Defaulting

The values in this field are displayed as a concatenation of supplier item, unit of measure, supplier, site and blanket number, for example, BCBX76889|BOX|Next Generation Graphix (DBA, Art Wilde)|NXGEN PCARD|1503. When a Catalog Supplier Item is selected, the item details and sourcing information are populated.

[Cobain 12.1.3] Requisition Lines

Requisition Lines | Sourcing | Currency | Outside Services | Requisition Lines DFF

| | | | |
|---------------------|-------------------|--------------------------|------------------------------|
| Smart Form | | Catalog Supplier Item | XYZ9899 Case Office Supp |
| Line Type | Goods | Item | XYZ9899 Case Office Supplies |
| Revision | | Category | MISC.MISC |
| Description | Wireless Printer | UOM | Case |
| Line Quantity | | Price | 95 |
| Amount | | Need By Date | |
| Line GL Date | | Tax Code | |
| Reference Num | | Destination Type | Expense |
| Requestor User Name | | Requestor | Stock, Ms. Pat |
| Requestor Number | 24 | Destination Organization | Vision Operations |
| Location | V1- New York City | Destination Subinventory | |
| Source Type | Supplier | Source Organization | |
| Source Subinventory | | Note to Buyer | |
| Note to Receiver | | Urgent | |

Row # 43

Ok Cancel

Default Sourcing Information

[Cobain 12.1.3] Requisition Lines

Requisition Lines | Sourcing | Currency | Outside Services | Requisition Lines DFF

| | | | |
|---------------|----------------------|-----------------|----------|
| Document Type | Quotation | Document Number | 676 |
| Document Line | 1 | Autosource | |
| Supplier | Office Supples, Inc. | Site | NEW YORK |
| Contact | | Contact Phone | |
| Supplier Item | | Buyer | |

Row # 43

Ok Cancel

| Sourcing | | | | Requisition Lines | | | | | | | | | | | | |
|----------|----------|----------|---------------|-------------------|---------------|-----------|------|----------|-----------|-----------------------|-------------|------|---------------|-------|--------|--------------|
| Catalog | Supplier | Item | Document Type | Document Number | Document Line | Line Type | Item | Revision | Category | Item Long Description | Description | UOM | Line Quantity | Price | Amount | Need By Date |
| XYZ9899 | Case | Office S | Quotation | 723 | 1 | Goods | | | MISC.MISC | | Wireless Pr | Case | 1 | 95 | | 6/21/2019 |
| XYZ9899 | Case | Office S | Quotation | 676 | 1 | Goods | | | MISC.MISC | | Wireless Pr | Case | 1 | 95 | | 6/21/2019 |

1.6. Sourcing Options

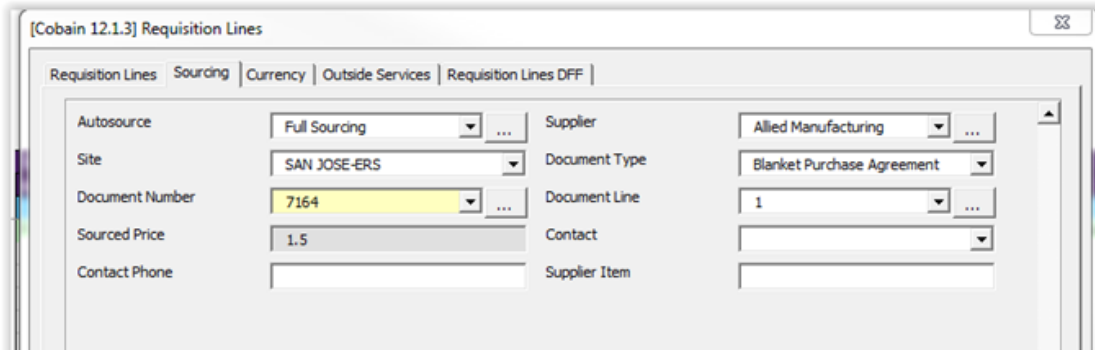
Version: 8.0.7

Date: 16/10/2019

1. Sourcing Rule options previously available in the ribbon have been replaced by a new column labelled 'Autosource' in the Sourcing section. This section has sourcing document details of supplier, supplier site, price associated with the item.
2. The sourcing options available in the Autosource field are 'Full Sourcing' and 'Partial Sourcing'. If the field is not populated, no sourcing option will apply.
3. Sourced Price is a read only column to display the price sourced from the relevant source document.

| Sourcing | | | | | | | | | | |
|--------------|----------|------|----------------|-----------------|---------------|---------------|---------|---------------|---------------|---------------------|
| Autosource | Supplier | Site | Document Type | Document Number | Document Line | Sourced Price | Contact | Contact Phone | Supplier Item | Buyer |
| Full Sourcin | Allied M | SAN | Blanket Purcha | 7164 | 1 | 1.5 | | | | Smith, Mr. Jonathan |

4. A new 'Sourcing' tab is available in the Requisition Line form.

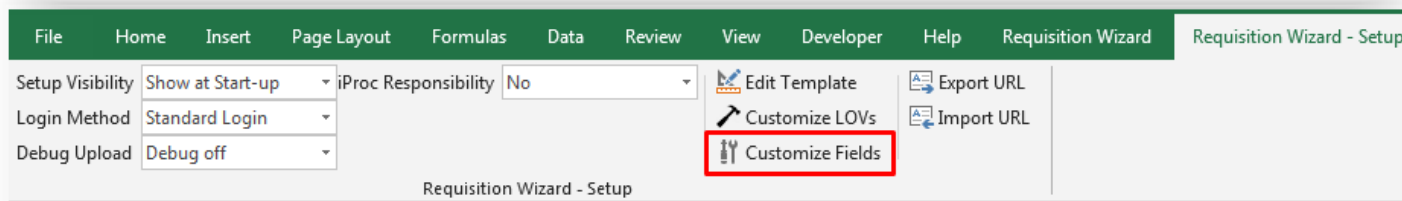


1.7. 'Customize Fields' is now replaced by Templating

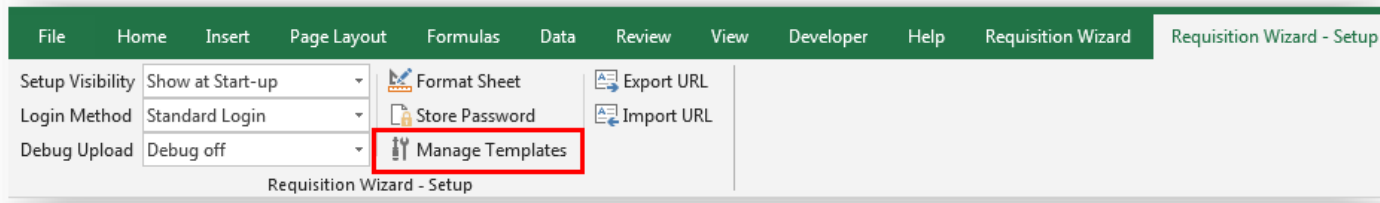
Version: 8.0.7

Date: 16/10/2019

Previous Wizard Ribbon Control to create user's worksheets:

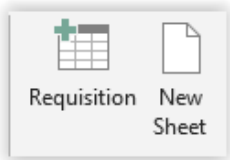


New Wizard Ribbon Control to create user's worksheets:



The 'Manage Templates' gives the following advantages:

- Templates are stored on each instance and can simply be selected by the user in the main ribbon:



- Templates are secure, preventing users from accessing data they do not have permission to view or change.
- Templates are easily copied from one instance to another.
- Templates are optional, predefined modes can instead be used where users create their own layouts as appropriate.

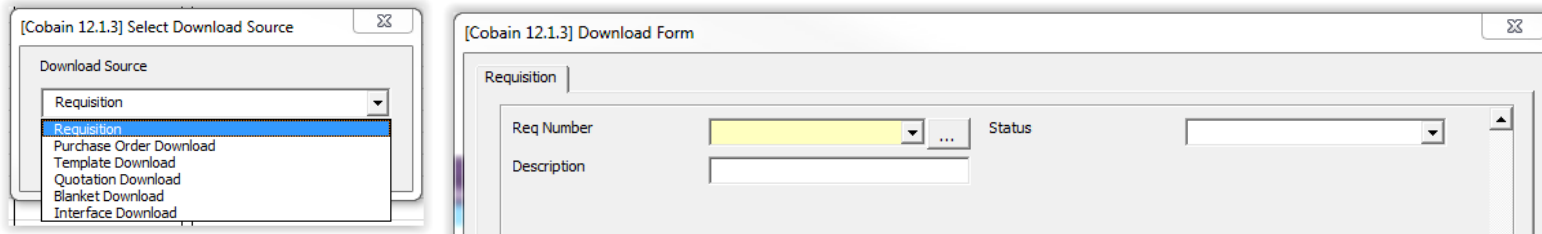
More information on the configuration and use of More4Apps Templating can be found [here](#).

1.8. Download Form

Version: 8.0.7

Date: 16/10/2019

The radio buttons in the 'Download' form have been replaced by the 'Download Source' criteria. Once the source is selected, additional download criteria is available in the Download form. There are additional download sources of Blanket and Interface records.



1.9. Obsolete Profile Option

Version: 8.0.7

Date: 16/10/2019

The Profile Option '*More4Apps: RW My Batches Only*' is now obsolete.

1.10. Customize your Lists of Values

Version: 8.0.7

Date: 16/10/2019

Previously, users can create customized views for selected List of Values. This functionality is no longer supported in the new architecture.