



## OATUG Members: Connecting. Learning. Saving.

### Connect

with Oracle users for answers, resources & assistance

### Learn

through conferences, online events and on-demand recordings

### Save

time and money by learning from others.

[OATUG.org/connect](https://OATUG.org/connect)



JULY 31• 1-2 PM ET

## Empower your Procurement Process with Spreadsheet Mastery: Streamline Data and Improve Quality

# OATUG

ORACLE APPLICATIONS & TECHNOLOGY USERS GROUP



**Wes Holmes**

Global MCIS Maintenance Cloud Intelligent Solutions,  
President Andrew Gooch, More4apps, Oracle Product  
Expert



**Andrew Gooch**

More4apps, Oracle Product Expert

An OATUG Affiliate Presentation from the OATUG Maintenance Cloud SIG.

Free registration. Recording available to OATUG members.

# Agenda

- Introductions
  - Wes Holmes, Andrew Gooch
  - More4apps
- Procurement for Maintenance and Capital Projects
  - What are the challenges we face?
- Spreadsheet Mastery
  - Streamline Data and Improve Quality
- What solutions are available to your Organization?
- Introducing More4apps ERP Cloud Toolbox Procurement Module
- Sample Business Process scenarios
- Q&A

JULY 31• 1-2 PM ET

## Empower your Procurement Process with Spreadsheet Mastery: Streamline Data and Improve Quality

# OATUG

ORACLE APPLICATIONS & TECHNOLOGY USERS GROUP



**Wes Holmes**

Global MCIS Maintenance Cloud Intelligent Solutions,  
President Andrew Gooch, More4apps, Oracle Product  
Expert



**Andrew Gooch**

More4apps, Oracle Product Expert

An OATUG Affiliate Presentation from the OATUG Maintenance Cloud SIG.

Free registration. Recording available to OATUG members.

# More4apps



Started in 2000  
22+ years Oracle Partner



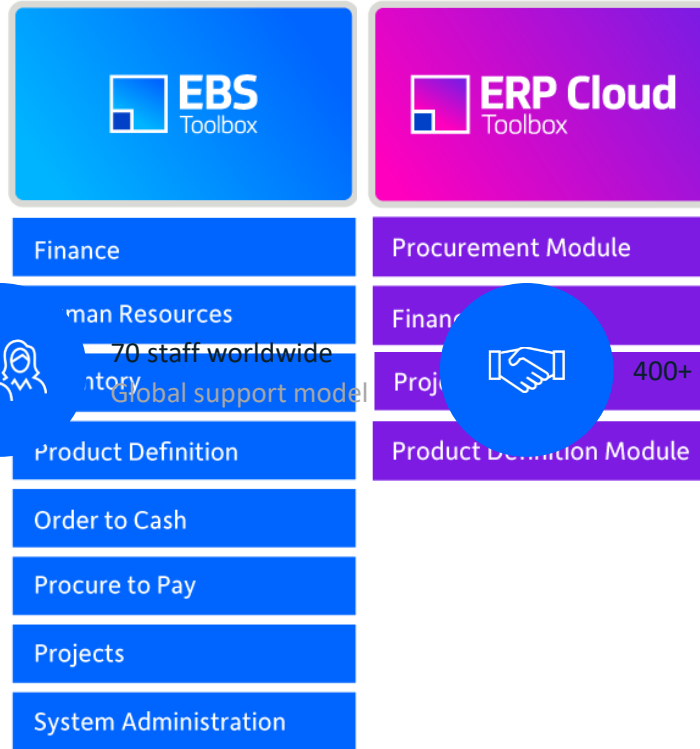
70 staff worldwide  
Global support model



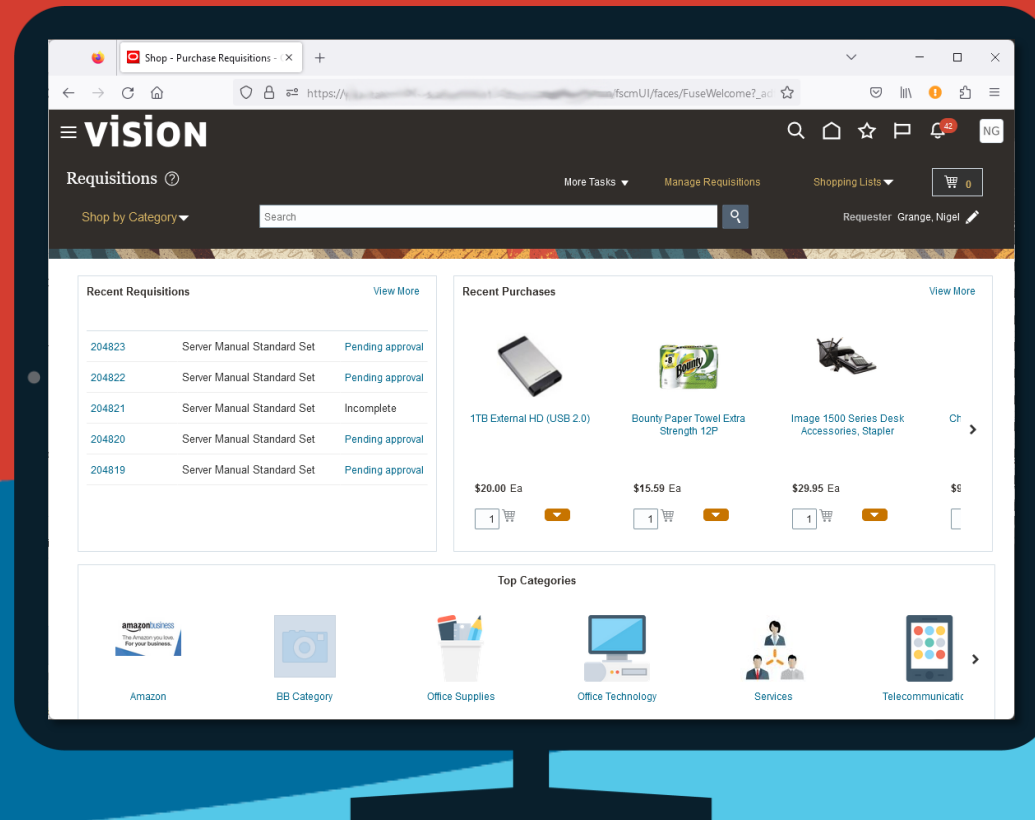
400+ customers



40,000+ users

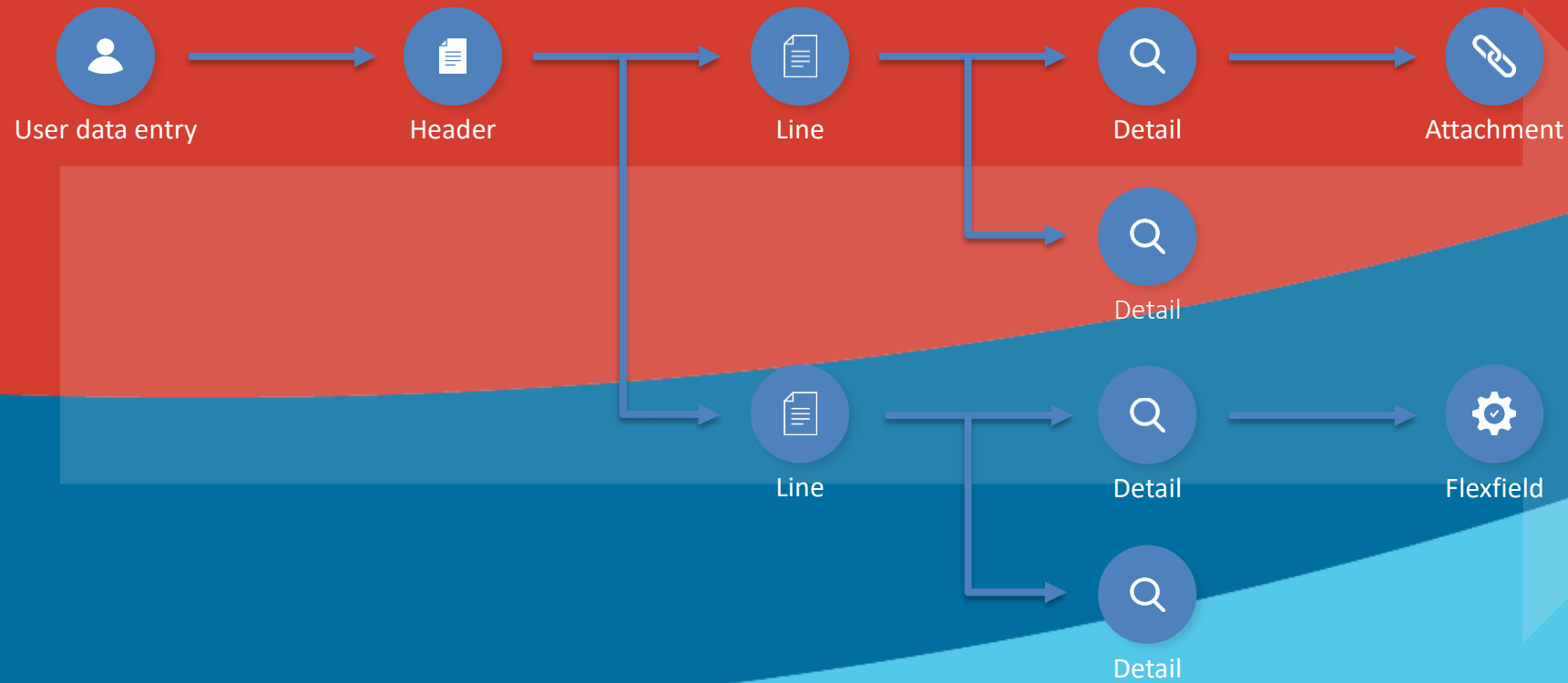


# Challenges in Procurement





# Front end data-entry Time-consuming form navigation



# Spreadsheet Loading

## A different approach to data entry

The screenshot displays a Microsoft Excel spreadsheet titled "More4Apps ECT Procurement Module.xlsx". The ribbon includes a "More4apps" tab with various icons for session, preparation, processing, setup, and support. The active cell is H20, containing the error message: "'Preparer does not exist in the List of Values.'".

The spreadsheet content includes a "Procurement Module" header and a table with the following columns: Req Header, Req Line, Req Line Attachments, Req Distributions, Messages, Upload Action, Requisition Status, Requisition, Load Action, Line, Line Status, Line Type, Item Rev, Line Description, Category, Supplier Item, Amount, and Currency Amount.

Req Header	Req Line	Req Line Attachments	Req Distributions	Messages	Upload Action	Requisition Status	Requisition	Load Action	Line	Line Status	Line Type	Item Rev	Line Description	Category	Supplier Item	Amount	Currency Amount
Accepted	Accepted	Accepted			Create		204835	INCOMPLE	1	INCOMPLE	Goods		Laptop		204.54	Laptops	
Accepted	Accepted				Create		204836	INCOMPLE	1	INCOMPLE	Goods		Wood Desk Tra	Desk Supplies			
Accepted	Accepted				Create			INCOMPLE	2	INCOMPLE	Goods		Catch All Organ	Desk Supplies			
Accepted	Accepted				Create			INCOMPLE	3	INCOMPLE	Goods		Porta Desk Top	Notebooks and Binders			
Accepted	Accepted				Create			INCOMPLE	4	INCOMPLE	Goods		Desktop Compl	Desktops			
Accepted	Accepted				Create			INCOMPLE	5	INCOMPLE	Goods		External 1Tb HD	Peripherals			
Accepted	Accepted				Create			INCOMPLE	6	INCOMPLE	Goods		Optical travel n	Peripherals			
Accepted	Accepted				Create			INCOMPLE	7	INCOMPLE	Goods		Workstation de	Office Supplies			
Error	Validated	Validated			Create			INCOMPLE	1	INCOMPLE	Goods		laptops	204.54	Laptops		
Accepted	Accepted	Accepted			Create		204837	INCOMPLE	1	INCOMPLE	Goods		Wood Desk Tra	Desk Supplies			
Accepted	Accepted	Accepted			Create			INCOMPLE	2	INCOMPLE	Goods		Catch All Organ	Desk Supplies			
Accepted	Accepted	Accepted			Create			INCOMPLE	3	INCOMPLE	Goods		Porta Desk Top	Notebooks and Binders			
Accepted	Accepted	Accepted			Create			INCOMPLE	4	INCOMPLE	Goods		Desktop Compl	Desktops			
Accepted	Accepted	Accepted			Create			INCOMPLE	5	INCOMPLE	Goods		External 1Tb HD	Peripherals			
Accepted	Accepted	Accepted			Create			INCOMPLE	6	INCOMPLE	Goods		Optical travel n	Peripherals			
Accepted	Accepted	Accepted			Create			INCOMPLE	7	INCOMPLE	Goods		Workstation de	Office Supplies			



# Spreadsheet Loading

## What solutions are available to your Organization?

**ADFDI\*** (Application Development Framework Desktop Integration)

**FBDI** (File Based Data Import)

**VBCS** (Visual Builder Cloud Service)

# ADFDI Application Development Framework Desktop Integration

The screenshot shows an Excel spreadsheet with the following data table:

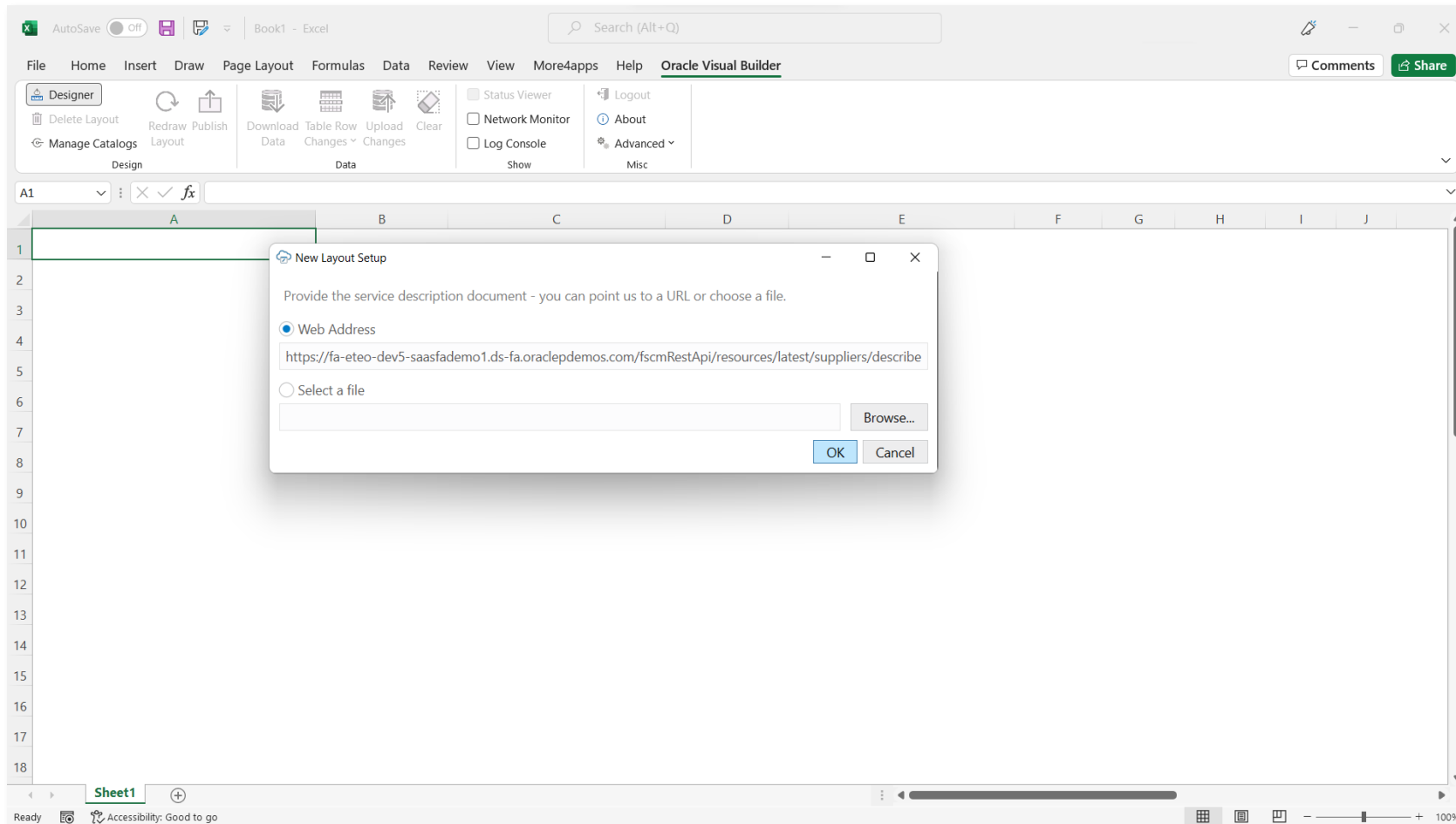
Changed	Flagged	Status	Action	Reason	Order	Supplier	Supplier Site	Buyer	Creation Date	Line	Item
					US168248	Amazon	Amazon US1	Nicholls, Tony	14/03/2023	1	AS00102
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	1	AS25100
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	2	AS00102
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	3	AS15000
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	4	AS00102
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	5	AS00102
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	6	AS00102
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	7	AS00102
					US168244	Midtown Computer Supplies	MCS US1	Roth, Calvin	14/03/2023	8	AS00102

Parameters listed in the spreadsheet:

- Procurement BU: US1 Business Unit
- Requisitioning BU: US1 Business Unit
- From PO Creation Date: 01/02/2023
- To PO Creation Date
- Days of Inactivity
- Requester
- From Budget Date
- To Budget Date
- Exclude Project Related: No

The 'Close Schedules' ribbon tab is highlighted with a purple box, showing icons for Login, Logout, Clear All Data, Edit Options, About, Download, Upload, and Status Viewer.

# VBCS Visual Builder Cloud Service

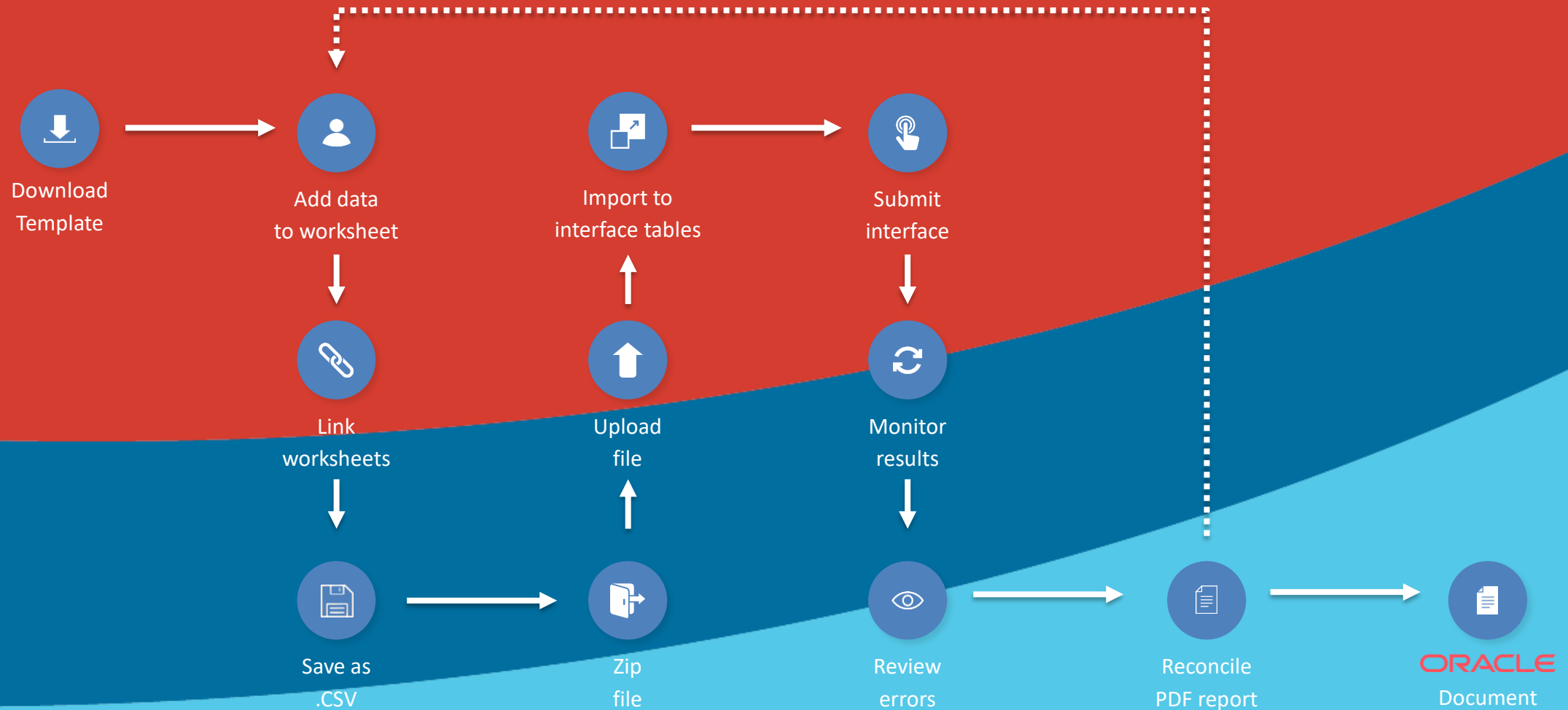


# FBDI File Based Data Import

The screenshot displays the Microsoft Excel interface with the following data in the 'Purchase Order Distributions' spreadsheet:

* Interface Distribution Key	* Interface Line Location Key	Distribution	Deliver-to Location	Requester	Subinventory	Amount	Quantity	CHARGE
ABC111	ABC11		1					12
DEF111	DEF11		1					12
DEF211	DEF21							5
DEF221	DEF22		1					7
GHI100	GHI10		1					8
GHI200	GHI20		1					16
GHI300	GHI30		1					14
GHI400	GHI40		1					12
GHI500	GHI50		1					8
GHI600	GHI60		1					10
GHI700	GHI70		1					18
JKL100	JKL10		1					31
JKL200	JKL20		1					42
JKL300	JKL30		1					7
JKL400	JKL40		1					1
JKL500	JKL50		1					8
JKL600	JKL60		1					1
MNO100	MNO10		1					3
MNO200	MNO20		1					33
MNO300	MNO30		1					3
MNO400	MNO40		1					5

# FBDI File Based Data Import



# Spreadsheet Loading

## What solutions are available to your Organization?

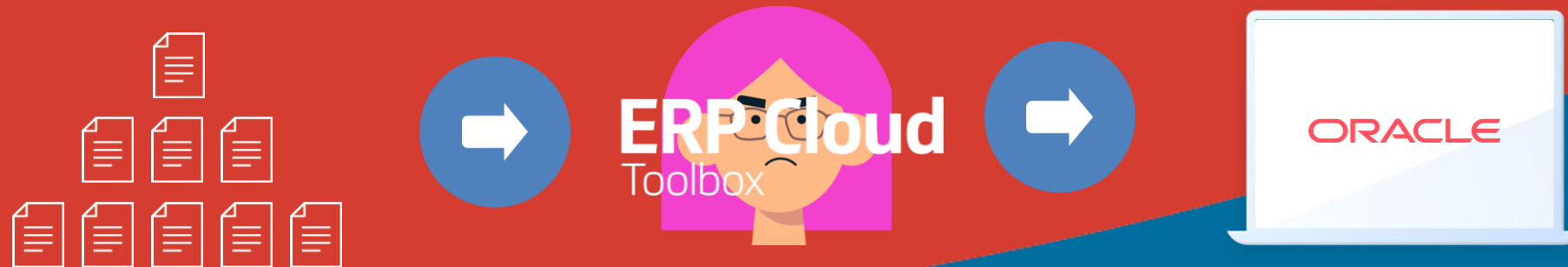
**ADFDI** (Application Development Framework Desktop Integration)

**FBDI** (File Based Data Import)

**VBCS** (Visual Builder Cloud Service)

# Spreadsheet Loading

## A different approach to data entry



### Your documents

Electronic, physical,  
contracts,  
external data sources etc.

### External spreadsheets or IT Dept

Wide visibility of data  
across broad range of columns

### Oracle documents

Information loaded into  
Oracle Ecosystem



# More4apps ERP Cloud Procurement Module



- End-to-end process within Excel
- Whole data structure in one sheet
- Download directly into worksheet
- Edit forms
- Feedback comes in the data row
- Error resolution made easy

# More4apps ERP Cloud Procurement Module

The screenshot displays the More4apps ERP Cloud Procurement Module interface. The main window shows a data table with columns for 'Status', 'Req Line', 'Req Line Attachments', and 'Req Distributions'. The table contains multiple rows, with most cells showing 'Accepted' and one cell showing 'Error'. A dialog box titled 'Preparer does not exist in the List of Value' is open, displaying a form for 'Line Upload Action'. The form includes fields for 'Line Number' (1), 'Line Status' (INCOMPLETE), 'Line Type' (Goods), 'Item' (laptops), 'Revision' (204.54 Laptops), 'Supplier Item', 'UOM' (Ea), and 'Line Quantity' (2). A red box highlights the 'Preparer' field in the dialog box, which is currently empty. The background shows a spreadsheet with a table of procurement items, including 'Laptop', 'Wood Desk Tra', 'Catch All Organ', 'Porta Desk Top', 'Desktop Compl', 'External 1Tb HD', 'Optical travel n', 'Workstation de', and 'laptops'.

Line	Type	Item	Rev	Line Description	Category	Supplier Item	Amount	Currency	Amount
1	Goods	Laptop	204.54	Laptops					
2	Goods	Wood Desk Tra		Desk Supplies					
3	Goods	Catch All Organ		Desk Supplies					
4	Goods	Porta Desk Top		Notebooks and Binders					
5	Goods	Desktop Compl		Desktops					
6	Goods	External 1Tb HD		Peripherals					
7	Goods	Optical travel n		Peripherals					
8	Goods	Workstation de		Office Supplies					
9	Goods	laptops	204.54	Laptops					
10	Goods	Wood Desk Tra		Desk Supplies					
11	Goods	Catch All Organ		Desk Supplies					
12	Goods	Porta Desk Top		Notebooks and Binders					
13	Goods	Desktop Compl		Desktops					
14	Goods	External 1Tb HD		Peripherals					
15	Goods	Optical travel n		Peripherals					
16	Goods	Workstation de		Office Supplies					
17	Goods	laptops	204.54	Laptops					
18	Goods	Wood Desk Tra		Desk Supplies					
19	Goods	Catch All Organ		Desk Supplies					
20	Goods	Porta Desk Top		Notebooks and Binders					
21	Goods	Desktop Compl		Desktops					
22	Goods	External 1Tb HD		Peripherals					
23	Goods	Optical travel n		Peripherals					
24	Goods	Workstation de		Office Supplies					

# More4apps ERP Cloud Toolbox Procurement Module



Navigation menu with icons for Login/Logout, Templates, Data Forms, Formatting, Download, Validate, Upload, Scheduled Processing, Settings, Diagnostics, and Help.

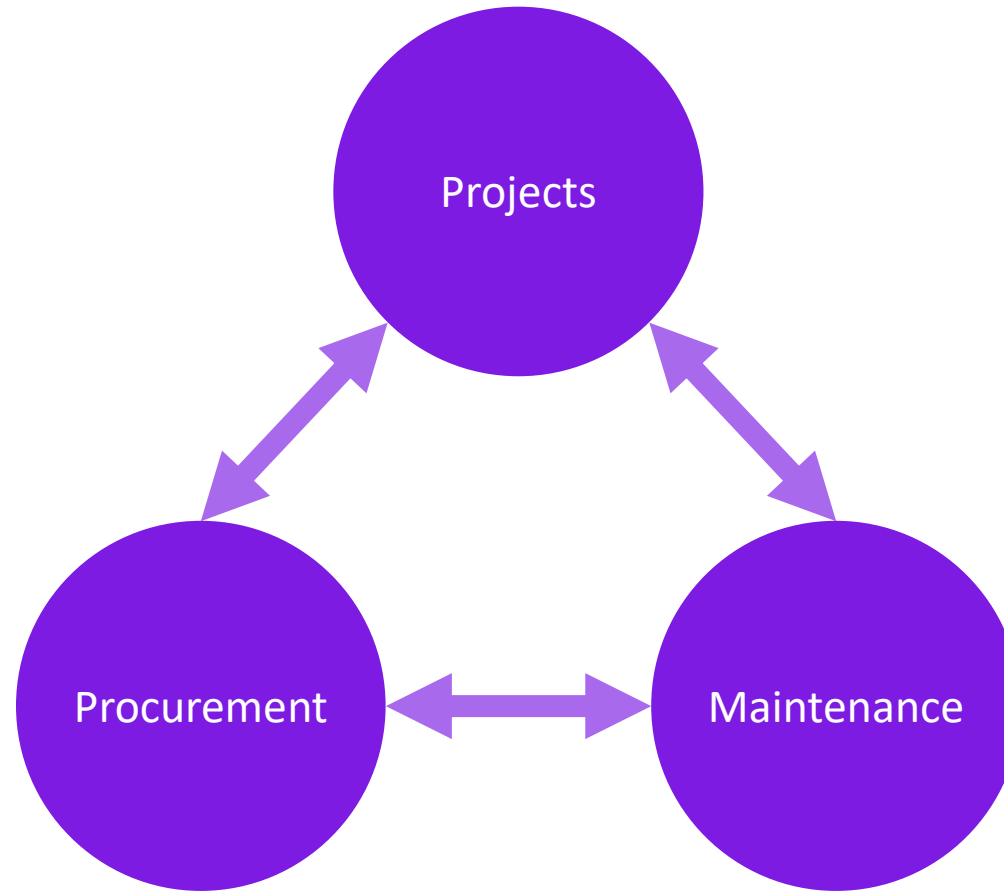
Excel grid header with columns A through AF and row numbers 1 through 10.



Procurement Purchase Requisitions

Status				Header				Lines																					
Req Header	Req Line	Req Line Attachments	Req Distributions	Messages	Upload Action	Requisition Status	Requisitioning BU	Preparer	Description	Messages	Upload Action	Line	Line Status	Line Type	Item Rev	Line Description	Category	Supplier Item	UOM	Quantity	Amount	Currency	Amount	Currency	Price	Requested D	Destin		
Default Values																													

# Business Flow



# More4apps ERP Cloud Toolbox Procurement Module



# Document Builder Automation

## Automated order creation can fail if the Requisition Line

- is set to emergency PO type, but the emergency PO already exists.
- does not have a negotiated source agreement.
- does not have a supplier contract purchase agreement, but the Negotiated check box on
- has requisition materials purchasable in the default inventory organization of the

## Or if assigned procurement BU

- The Automatically generate purchase order check box isn't selected on the source agreement
- The Consolidate Online Requisitions into Fed By the supplier opt in feature is enabled and you didn't run the Generate Orders process to create the purchase order



# Document Builder Automation

Process Requisitions ?

▶ Search

Search Results: Requisition Lines

Actions ▼ View ▼ Format ▼ **Detach** Wrap

	Requisition	Line	Line Description	Requester	Quantity	UOM	Price	Amount	Currency
▶ ⚠	205114	2	Power Cord, Length 2M	Wright, David	12	Ea	5.00	60.00	USD
▶ ⚠	205114	4	Blue Hat Enterprise Linux	Wright, David	1	Ea	99.00	99.00	USD
▶	205113	1	Elegant Biro Pen	Wright, David	10	Ea	25.00	250.00	USD
▶	205113	2	Memory Riser	Wright, David	12	Ea	7.95	95.40	USD
▶	205113	3	Oracle Linux	Wright, David	3	Ea	100.00	300.00	USD
▶	205113	4	Blue Hat Enterprise Linux	Wright, David	1	Ea	99.00	99.00	USD
▶	205112	1	Classic 0.5 mm Pencil, Bl	Wright, David	15	Ea	1.95	29.25	USD
▶ ⚠	205112	2	Power Cord, Length 2M	Wright, David	12	Ea	5.00	60.00	USD

Session: Login/Logout, Templates, Data Forms, Formatting, Download, Validate, Upload, Scheduled Processing, Settings, Diagnostics, Help

Grid lines and cell selection (G12)

# Procurement Module

## Procurement Document Builder

### Status Sourcing Lines

Header Status Lines Status Submit Status Delete Status Messages Upload Action Header Id Procurement BU Requisitioning BU Type Agreement Agreement Info Supplier Supplier Number Supplier Site Messages Upload Action Requisition Line Req Requisitioning BU Req Procurement BU Req Agreement Agreement Type

Status				Sourcing							Lines						
Default Values																	

# More4apps ERP Cloud Toolbox Procurement Module



Login/Logout

Templates

Data Forms

Formatting

Download

Validate

Upload

Scheduled Processing

Settings


Diagnostics

Help

Session
Preparation
Processing
Setup
Support

A11

A B C D E F G H I J K L M N O P Q R S T U V



# Procurement Module

Procurement  
Standard Purchase Orders

Status					Header					Default Values												
PO Header	Approval Status	Status	PO Line	PO Schedules	PO Distributions	Messages	Upload Action	Existing Order	Change Order	Procurement BU	Document Style	Approval Status	Funds Status	Buyer	Requisitioning BU	Sold To Legal Entity	Supplier	Supplier Numt	Supplier Site	Supplier Contact	Communication Email	Bill To Bus



# More4apps ERP Cloud Toolbox Procurement Module







Session: Login/Logout, Templates, Data Forms, Formatting, Download, Validate, Upload, Scheduled Processing, Settings, Diagnostics, Help

E12

A B C D E F G H I J K L M N O P Q R S T U

1						
2						
3						
4						
5						
6	<b>Procurement</b>					
7	<b>Cancel Purchase Orders</b>					
8	<b>Status</b>	<b>Headers</b>				
9	Headers Status	Headers Messages	Header Upload Action	Order Number	Cancel Reason	Cancel Unfulfilled Demand P
10	Default Values	Cancel	Not Required	No		
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						
31						
32						
33						
34						

# Canceling / Completing Orders

	ERP Cloud Toolbox	ORACLE
Advanced pre-upload validation		
Cancel orders at any level		
Download selected orders		
User-friendly download form		
Download is optional		



# More4apps ERP Cloud Toolbox



Procurement Module	Purchase Orders
Projects Module	Financial Projects
Product Definition Module	Project Templates
Finance Module	Costs & Adjustments
	Budgets
	Award Budgets
	Assets & Assignments
	Resource Assignments
	Planning RBS

# Questions?

Andrew Gooch  
More4apps (UK) Ltd

[andrew.gooch@more4apps.com](mailto:andrew.gooch@more4apps.com)

Wes Holmes  
Global MCIS

[woholmes@outlook.com](mailto:woholmes@outlook.com)

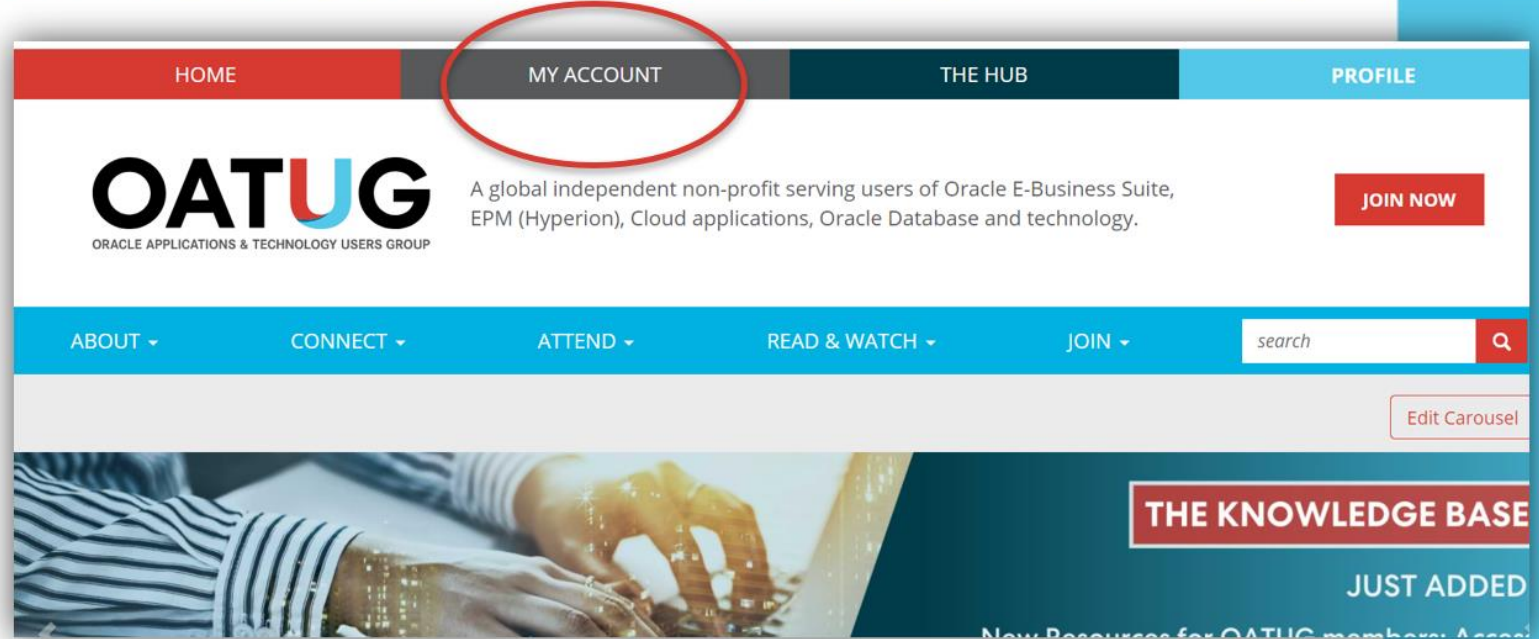
# Join the OATUG Global Network of Oracle Users & Pros

## Sign up for news from Geos & SIGs

- Go to My Account > Geos/SIGs
- No account? Create a free profile first.

## Then join OATUG for company-wide access to:

- **The Knowledge Base:** Thousands of recordings and presentations
- **The Hub:** Discussion forums connecting you to a global network of Oracle users and professionals
- **Savings:** Save hundreds when registering for OATUG online and in-person conferences and events with members-only discounts



[www.oatug.org](http://www.oatug.org)

OATUG



Ascend 2024  
in Las Vegas  
June 17 - 20, 2024

presented by

**OATUG**  
ORACLE APPLICATIONS & TECHNOLOGY USERS GROUP

 **OHUG**  
ORACLE HCM USERS GROUP

**OATUG**