Oracle® Purchasing Documentation Updates

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Oracle Purchasing Documentation Updates

This document contains important information. Please read this section for the latest updates, revisions, and additions to your user's guide.

Setup Overview

Important setup information needs to be added to the "Setup Overview" section.

See: Setup Overview, *Oracle Purchasing User's Guide*.

Define Locations (Required)

Add this step after **Step 3 Set Up Calendars, Currencies, and Set of Books**. See: Site Locations, *Oracle Human Resources User's Guide*.

If you're also setting up other Oracle applications, you may already have defined locations when you set up those applications.

Define Freight Carriers (Optional)

Add this step after **Step 5 Set Up Units of Measure**. See: Defining Freight Carriers, *Oracle Inventory User's Guide*.

> **Note:** You must perform this step for each inventory organization.

If you're also setting up Oracle Inventory, you may already have defined freight carriers when you set up Inventory.

Define Categories

Add this step after **Step 6 Set Up Items**.

Defining categories involves the following tasks:

- Define category codes. See: Defining Categories, *Oracle Inventory User's Guide*. (Required)
- Define category sets. See: Defining Category Sets, *Oracle Inventory User's Guide*. (Required with defaults)
- Define default category sets. (Required with defaults) See: Defining Default Category Sets, *Oracle Inventory User's Guide*.

  Note: Purchasing requires you to enforce a list of valid categories. Therefore, in the List of Valid Categories in the

Category Sets window, you must list all categories that are eligible for that category set. In particular, make sure that the Default Category in the Category Sets window also appears in the List of Valid Categories.

If you're also setting up Oracle Inventory, you should already have defined categories when you set up Inventory.

Define Payment Terms (Optional)

Add this step after **Step 13 Set Up Cross–Reference Types, Tax Names, and Location Associations**. See: Payment Terms, *Oracle Payables User's Guide*.

If you're also setting up Oracle Payables, you may already have defined payment terms when you set up Payables.

Define Transaction Reasons (Optional)

Add this step after **Step 22 Set Up Financial Options**. See: Defining Transaction Reasons, *Oracle Inventory User's Guide*.

If you're also setting up Oracle Inventory, you may already have defined transaction reasons when you set up Inventory.

Set Up Approval Workflow Option (Required with defaults)

Add this step after **Step 30 Modify Change Order Workflow Options**. See the section "Choosing Workflow Options" later in this document for information on setting up this approval workflow option.

Additional Setup Notes

If you want to define catalog groups, which is optional, do so after the step **Define Categories** above. See: Defining Item Catalog Groups, *Oracle Inventory User's Guide*. (If you're also setting up Oracle Inventory, you may already have defined item catalog groups when you set up Inventory.)

If you want to define descriptive flexfields, do so last, after all the other setup steps. See: *Oracle Applications Flexfields Guide*.

Choosing Workflow Options

In addition to the other workflow setup options described in the section "Choosing Workflow Options" in your documentation, you need to consider one more option—an item attribute in the Main Requisition Approval Process called ”Send PO Autocreation to Background.”

Send PO Autocreation to Background

This item attribute is used by the ”Get AutoCreate PO Mode” function activity in the Main Requisition Approval Process. By default, the attribute is set to ’Y’ for Yes, to send automatic document creation to *background* mode. But you can change it to ’N’ for No if you’d rather process automatic document creation in *online* mode.

Background and online modes affect your system performance in different ways. For more information on what background and online mean, see *PO: Workflow Processing Mode* in the section Profile Options in Purchasing, *Oracle Purchasing User’s Guide*.

☞ **Attention:** Since this attribute is set to ’Y’ by default—which means automatic document creation occurs in background mode—you must start the Workflow Background Process in the Submit Requests window in the System Administrator responsibility. As long as this attribute is set to ’Y,’ you must start the Workflow Background Process. You can submit the process for all workflows or just for a particular workflow, in this case the PO Requisition Approval workflow. See: To Schedule Background Engines, *Oracle Workflow Guide*.

Note: A function activity in both the PO and Requisition Approval workflows, called ”Get Workflow Approval Mode,” sets the processing mode for the entire approval workflow in Purchasing, based on how the profile option *PO: Workflow Processing Mode* is set. While this function activity sets the processing mode for the entire approval workflow in Purchasing, the item attribute ”Send PO Autocreation to Background” enables you to change the processing mode specifically for automatic document creation, regardless of how the profile option *PO: Workflow Processing Mode* is set. ”Send PO Autocreation to Background” informs the function activity ”Get AutoCreate PO Mode” whether ”Launch Create PO Workflow” in the Main Requisition Approval Process should initiate automatic document creation in background or online modes.

See:

Choosing Workflow Options, *Oracle Purchasing User’s Guide*

Approval Workflows, *Oracle Purchasing User’s Guide*

Profile Options in Purchasing

The first and second descriptions below are about new profile options. The third contains more information about a profile option already described in your documentation.

PO: Workflow Processing Mode

This profile option affects the performance of the Purchasing approval workflow processes. You can choose from two values:

Online — Completes an entire approval workflow process before letting you close the window you're using, but provides you with an updated Status (for purchase orders) as soon as it finishes.

Background — Enables you to proceed to the next activity while the process completes in the background, even though you may not see an updated Status right away.

Whichever option you choose, you can always view the current status or action history of a requisition or purchase order through the Requisitions Summary or Purchase Orders Summary windows. You can also view notifications of approval through the Notifications Summary window.

The default value (if you don't provide one) is *Background*.

☞ **Attention:** When this profile option is set to *Background*, you must start the Workflow Background Process, which you access through the System Administrator responsibility. It is recommended that you set this process to run frequently, if you are using it for *Background* mode approvals. See: To Schedule Background Engines.

The user can both view and update this profile option. It can also be updated at the User, Responsibility, Application, and Site levels.

See: Profile Options in Purchasing.

PO: Set Debug Concurrent ON

This profile option is used, *usually by technical support staff only*, for finding problems with Requisition Import. The default value is No. The user can view and update this profile option. It can also be updated at the user, responsibility, application, and site levels.

Caution: For performance reasons, it is very important that this profile option *always* be set to No, unless you are instructed otherwise by Oracle Corporation.

PO: Set Debug Workflow ON

This profile option is used, *usually by technical support staff only*, for finding problems with Purchasing workflow processes. The default value is No. The user can view and update this profile option. It can also be updated at the user, responsibility, application, and site levels.

Caution: For performance reasons, it is very important that this profile option *always* be set to No, unless you are instructed otherwise by Oracle Corporation.

See: Profile Options in Purchasing, *Oracle Purchasing User's Guide*.

Using the Account Generator in Oracle Purchasing

Note the changes described here if you need to open and view, or customize, the Account Generator in Purchasing.

The section "Using the Account Generator in Oracle Purchasing" currently lists eight Account Generator workflows (also called item types) that automatically build charge, budget, accrual, and variance accounts—four for purchase orders and releases, and four for requisitions.

However, to enhance the performance of the Account Generator in Purchasing whenever an account is generated on a purchase order or requisition, these eight item types were recently collapsed into two—one for purchase orders and releases, and one for requisitions:

- PO Account Generator
- PO Requisition Account Generator

This means that when you open (or customize) an Account Generator item type in the Oracle Workflow Builder, you'll see (or customize) just these two—not eight, as described in your documentation currently.

Collapsing the eight item types into two has not changed anything else about *how* the Account Generator in Purchasing works as described currently in your documentation. However, it does change how the processes are organized within the two item types, and what you can and cannot customize.

The following sections show which parts of your documentation need to be updated accordingly.

See: Using the Account Generator in Oracle Purchasing, *Oracle Purchasing User's Guide*.

Decide How to Use the Account Generator

This section is unchanged. See your current documentation for the latest information.

The Default Account Generator Processes for Oracle Purchasing

For this section, substitute the following information.

Evaluate whether the default Account Generator processes meet your accounting requirements. No setup steps are required to use the default. The default processes can also be updated later as your needs change.

Note: If you used FlexBuilder in Release 10 but did not customize the default configuration, you can use the default Account Generator process in Release 11, which gives you the same result as the default assignments in FlexBuilder.

Each Account Generator workflow is called an *item type*. Purchasing comes with the following Account Generator item types for purchase orders, releases, and requisitions:

- PO Account Generator (for purchase orders and releases)
- PO Requisition Account Generator (for requisitions)

Each item type above contains the following top–level processes:

- Generate Default Accounts

  This process is the default workflow in Purchasing that builds the accounts.

- Generate Accounts Using FlexBuilder Rules

In turn, each of these top–level processes contains other processes within them and, within these, additional subprocesses and function activities. These are described below.

Viewing Account Generator Processes in the Workflow Builder

For this section, substitute the following information.

To open the PO Account Generator in the Oracle Workflow Builder, choose Open from the File menu and select PO Account Generator. To open the PO Requisition Account Generator in the Workflow Builder, choose Open from the File menu and select PO Requisition Account Generator. Explore how these item types break down in the Workflow Builder's Navigator.

Although all the processes are listed together in the Workflow Builder's Navigator, only two—Generate Default Accounts and Generate Accounts Using FlexBuilder Rules—are the top–level processes. Note that the icons for the two top–level processes look slightly different from the other process icons, indicating that they are the top–most processes. The rest of the processes belong to the two top–level processes. For example, when you open (double–click) the top–level process Generate Default Accounts to view it as a diagram, you see it contains four main processes—Generate Default Accrual Account, Generate Default Budget Account, Generate Default Charge Account, and Generate Default Variance Account.

When you open the process Generate Default Accrual Account, you see it contains many function activities and one subprocess—Build Project Related Account. (For an example of how a default Account Generator process itself looks in the Workflow Builder, see the current Purchasing documentation.) As you can see, all of these processes and subprocesses are listed under Processes in the Workflow Builder's Navigator.

To better understand which processes are subprocesses of the others, use the following structural breakdown:

- **PO Account Generator** *(workflow item type)*
  - **Generate Default Accounts** *(top–level process)*
    - **Generate Default Accrual Account** *(process)*
      - Work Item Destination Type *(function activity)*
      - PO Project–Related? *(function activity)*
      - Build Project Related Account *(subprocess)*
      - Accrual Account for Expense Item *(function activity)*
      - Accrual Account from Organization *(function activity)*
    - **Generate Default Budget Account** *(process)*
      - PO Project–Related? *(function activity)*
      - Build Project Related Account *(subprocess)*
      - Work Item Destination Type *(function activity)*
      - Get Budget Account from Item / Sub *(function activity)*
      - Get Item Level Budget Account *(function activity)*

– Get Org Level Budget Account *(function activity)*

– Get Charge Account *(function activity)*

– **Generate Default Charge Account** *(process)*

– Work Item Destination Type *(function activity)*

– Build Expense Charge Account *(subprocess)*

– Expense Account *(function activity)*

– PO Project–Related? *(function activity)*

– Build Project Related Account *(subprocess)*

– Build Inventory Charge Account *(subprocess)*

– Build Shop Floor Charge Account *(subprocess)*

– Type of WIP *(function activity)*

– Job WIP Account *(function activity)*

– Schedule Account *(function activity)*

– **Generate Default Variance Account** *(process)*

– Work Item Destination Type *(function activity)*

– Get Charge Account for Variance Account *(subprocess)*

– PO Project–Related? *(function activity)*

– Get Charge Account *(function activity)*

– Build Project Related Account *(subprocess)*

– Get Variance Account from Organization *(subprocess)*

– Variance Account from Organization *(function activity)*

– **Generate Accounts Using FlexBuilder Rules** *(top–level process)*

– **Generate Charge Account Using FlexBuilder Rules**

– **Generate Budget Account Using FlexBuilder Rules**

– **Generate Accrual Account Using FlexBuilder Rules**

– **Generate Variance Account Using FlexBuilder Rules**

- **PO Requisition Account Generator** *(workflow item type)*

  This workflow item type breaks down exactly like the PO Account Generator item type above.

Standard Flexfield Workflow

All of the processes listed above contain additional function activities not listed here, such as Start and End function activities. These are standard function activities provided in the Standard Flexfield Workflow item type. These also include the function activities ”Copy Values from Code Combination” and ”Validate Code Combination” that you see used in the Account Generator processes. For information on how to use these function activities, see the *Oracle Applications Flexfields Guide*.

Item Attributes

Each account generator (workflow item type) contains a number of item attributes. These attributes correspond to all the raw parameters and some derived parameters that were used in FlexBuilder. The item attributes for the PO Requisition Account Generator are slightly different from the item attributes for the PO Account Generator.

Build Project Related Account

The subprocess Build Project Related Account is available for you to customize if Oracle Projects is installed. To use this process, you provide your own rules to the process, in the form of workflow process definitions, to build the account.

For more information about using the Account Generator when you integrate Purchasing with Oracle Projects, read the following essay: Using the Account Generator in Oracle Projects *(Oracle Projects User’s Guide).*

What the Account Generator Does in Oracle Purchasing

This section is unchanged. See your current documentation for the latest information.

Generate Account Using FlexBuilder Rules Process

For this section, substitute the following information.

If you customized FlexBuilder in a previous release to generate account combinations, you can use the Generate Accounts Using FlexBuilder Rules process to replicate your FlexBuilder setup automatically, without changing any of your predefined FlexBuilder Rules, and without customizing the Account Generator. This top–level process consists of the following processes:

- Generate Charge Account Using FlexBuilder Rules replicates your charge account FlexBuilder rules in the Account Generator.
- Generate Budget Account Using FlexBuilder Rules replicates your budget account FlexBuilder rules in the Account Generator.
- Generate Accrual Account Using FlexBuilder Rules replicates your accrual account FlexBuilder rules in the Account Generator.
- Generate Variance Account Using FlexBuilder Rules replicates your variance account FlexBuilder rules in the Account Generator.

To build accounts, these processes call the appropriate functions that were generated during your upgrade from Release 10 to Release 11.

If you are upgrading from Release 10, follow the guidelines in the FlexBuilder chapter of the *Oracle Applications Upgrade Preparation Manual*.

Customizing the Account Generator for Oracle Purchasing

For this section, substitute the following information.

Purchasing provides default Account Generator processes for you to use. If the defaults do not satisfy your accounting requirements, you can use the Oracle Workflow Builder to customize the default processes.

You can customize any of the following processes and the subprocesses within them:

- Generate Default Accrual Account
- Generate Default Budget Account
- Generate Default Charge Account
- Generate Default Variance Account

You cannot customize the two top–level processes:

- Generate Default Accounts
- Generate Accounts Using FlexBuilder Rules

You cannot customize any process belonging to Generate Accounts Using FlexBuilder Rules:

- Generate Charge Account Using FlexBuilder Rules
- Generate Budget Account Using FlexBuilder Rules
- Generate Accrual Account Using FlexBuilder Rules

• Generate Variance Account Using FlexBuilder Rules

You cannot customize most function activities, since these map directly to PL/SQL programs in the Oracle database, but you can replace a function activity with one of your own. See **Customization Example** below.

If you want to create a new process or customize an existing one to meet your business needs, make a backup copy of the default processes that Oracle provides, and then use the Oracle Workflow Builder to customize a process or create a new one.

For more information on the generic features and functions of the Account Generator, see Customizing the Account Generator, *Oracle Applications Flexfields Guide*.

For more information on how to use the Oracle Workflow Builder, see the *Oracle Workflow Guide*.

Customization Guidelines

For this section, substitute the following information.

When you choose to customize the Account Generator in Purchasing, consider the following:

Once the Account Generator successfully builds accounts for a document, it does not attempt to rebuild when you update the document. For example, if you build a custom process to generate the requisition charge account for Expense purchases based on requestor, and change the requestor after the Account Generator constructs the charge account, it will not attempt to rebuild.

Requisition Import does not use the Account Generator to construct charge, budget, accrual, or variance accounts. Any custom process that you create cannot be used by this utility.

Customization Example

For this section, substitute the following information.

In the Generate Default Charge Account process, under the PO Account Generator item type, you could modify the Build Expense Charge Account subprocess by replacing the Get Expense Account ID function activity with one of your own. A new function activity, however, must have the same result type as the function activity you replace. In your new function activity in this example, you also must set the item attribute, **Temp Account ID**, with the code combination identification number (CCID) of the account being built. This attribute is used by the function activity, **Copy Values from Account ID**, to fetch the concatenated segments.

You must test any customizations to the Account Generator before using them on a production database.

Implementing a Customized Account Generator Process

For this section, substitute the following information.

Use the Account Generator Processes window to choose either the Generate Default Accounts process or the Generate Accounts Using FlexBuilder Rules process and associate the process with the appropriate Accounting Flexfield structure and item type.

Choosing the Process for a Flexfield Structure

For this section, substitute the following information.

If you customize any of the customizable processes belonging to the Generate Default Accounts process, and you make sure the Generate Default Accounts process is associated with the appropriate Accounting Flexfield structure and item type in the Account Generator Processes window, your customizations will take effect.

1. Navigate to the Account Generator Processes window by switching to the System Administrator responsibility and choosing Application > Flexfield > Key > Accounts.
2. With your cursor in the Application field, choose Query > Find and select the combination of Application, Flexfield Title, and Structure that you need.

   Or, perform a Query > Run and locate the PO Account Generator and PO Requisition Account Generator item types in the Item Type column.
3. In the Process field, specify the process—Generate Default Accounts or Generate Accounts Using FlexBuilder Rules—that you want to use to generate these accounts.

   The default process, Generate Default Accounts, will default in.

Using the Account Generator Profile Option

This section is unchanged. See your current documentation for the latest information.

Receiving Catalog Information Electronically

The Purchasing Documents Open Interface supports price breaks. If you additionally want to import price break information through the Purchasing Documents Open Interface, add the following information to the Purchasing Documents Open Interface section of the *Oracle Manufacturing, Distribution, Sales and Service Open Interfaces Manual, Release 11*.

Importing Price Break Information

The following, additional columns are required in the PO_LINES_INTERFACE table if you want to import price break information:

- LINE_NUM
- SHIPMENT_NUM
- QUANTITY
- UNIT_PRICE

If you are importing price break information through catalog quotations, you can also, optionally populate the following columns in the PO_LINES_INTERFACE table:

- MIN_ORDER_QUANTITY
- MAX_ORDER_QUANTITY

Recall that the PO_LINES_INTERFACE table contains both line and shipment information, and imports data into both the PO_LINES and PO_LINE_LOCATIONS tables in Purchasing. So, if you wanted to create two price breaks corresponding to one blanket agreement or quotation line, you would create two records in the PO_LINES_INTERFACE table. That is, one header–level record in the PO_HEADERS_INTERFACE table would have two records in the PO_LINES_INTERFACE table, and both of these line records would have the same INTERFACE_HEADER_ID.

For example:

Header: one header–level record (row) in PO_HEADERS_INTERFACE corresponds to:

– **Line 1:** one line–level record (row) in PO_LINES_INTERFACE with its corresponding shipment:

  – **Shipment 1:** one shipment record in PO_LINES_INTERFACE corresponding to Line 1

– **Line 1:** the same line–level record (another row) in PO_LINES_INTERFACE with the other corresponding shipment:

  – **Shipment 2:** the other shipment record in PO_LINES_INTERFACE corresponding to Line 1

See:

Receiving Price / Sales Catalog Information Electronically, *Oracle Purchasing User's Guide*

Purchasing Documents Open Interface, *Oracle Manufacturing, Distribution, Sales and Service Open Interfaces Manual, Release 11*

Confirm Receipts Workflow Select Orders Process

The Confirm Receipts Workflow Select Orders process in Purchasing must be running in order to use the Confirm Receipts workflow. The Confirm Receipts workflow sends notifications through the Web, e–mail, or Notifications Summary window to requestors or buyers who create requisitions through Oracle Self–Service Web Applications or Purchasing.

The Confirm Receipts workflow sends notifications for items with a Destination or Deliver–To Type of Expense, a Routing of Direct Delivery, and a Need–By date that is equal to or later than the current date.

The Workflow Background Process must be running before you can submit the Confirm Receipts Workflow Select Orders process. In the Submit Requests window, in the System Administrator responsibility, select Workflow Background Process in the Request Name field. See: To Schedule Background Engines, *Oracle Workflow Guide*.

To submit the Confirm Receipts Workflow Select Orders process, navigate to the Submit Requests window, select Confirm Receipts Workflow Select Orders in the Request Name field, choose Schedule, and choose how often you want the process to run. For example, if you set it to run one or two times a day, the Confirm Receipts workflow will query for purchase orders that meet the criteria described above and send notifications (if required) one or two times a day.

See: Confirm Receipts, *Oracle Web Employees online documentation*.

Advance Shipment Notices (ASNs)

In the section *Types of ASNs*, a Replacement ASN is listed as one type of ASN. There is no Replacement ASN. There are only Original, Cancellation, and Test ASNs. To replace an ASN with a new or corrected ASN, your supplier should send a Cancellation ASN to cancel the Original ASN, and then send a new Original ASN.

Users should note that any references to a Replacement ASN are simply the act of sending a Cancellation ASN followed by a new Original ASN.

See: Advance Shipment Notices (ASNs).

Workflow Background Process

In your user's guide, the Workflow Background Process is described as appearing in the list of values in the Submit Request window when you choose Reports > Run. The Workflow Background Process is accessible only through the Oracle System Administrator responsibility, not Purchasing.

The Workflow Background Process must be running if you are using the following options:

- The *Background* mode for Purchasing approvals. By default the profile option in PO: Workflow Processing Mode is set to *Background*. You must start the Workflow Background Process in order for the *Background* mode to work.
- The Timeout feature in the approval workflow processes for purchase orders or requisitions. The Timeout feature is enabled only if you modify the notification(s) associated with it in the Oracle Workflow Builder. The Timeout feature sends periodic reminders to approvers or automatically forwards a notification to the next approver in the hierarchy after no response is received over a particular period of time.

See: Approval Workflows and Workflow Background Process.

Receiving Price/Sales Catalog Information Electronically

Important Addition to Setup Requirements

Following are additional setup requirements for importing price/sales catalog information.

Allowing updating of the item master enables price or item description changes to be communicated quickly to Purchasing. Before you run the EDI Price/Sales Catalog Inbound Program or the EDI Response to Request for Quote Inbound Program, you need to make sure of the following settings if you want to update the item master:

- Allow updating of item descriptions. Navigate to the Purchasing Options window. In the Control options region, check Allow Item Description Update.
- Allow updating of item status codes at the site level. Navigate to the Personal Profiles window. Make sure that INV: Default Item Status is set to Active.

Make sure default category sets are set up appropriately for both Purchasing and Inventory by performing the following steps:

1. Navigate to the Default Category Sets window by choosing Setup > Items > Categories > Default Category Sets in the Purchasing responsibility.

   Make sure that both Purchasing and Inventory are listed in the Functional Area column and each has a default Category Set defined for it.

2. Make sure that you have a default category set for both Purchasing and Inventory in the Category Sets window. Navigate to the Category Sets window by choosing Setup > Items > Categories > Category Sets in the Purchasing responsibility.

   See: Defining Category Sets.

   If you've selected the Enforce List of Valid Categories checkbox in the Category Sets window, make sure that the Default Category also appears in that List of Valid Categories. If not, enter it in the list.

Additional Information about Sourcing

Please note the following additional information about sourcing rules when importing price/sales catalog information.

When you import price/sales catalog information into Purchasing through the EDI Catalog Inbound or EDI Response to RFQ Inbound report in Oracle EDI Gateway, you have the option of choosing Yes or No in the Create Sourcing Rules field in the Parameters window that appears. If you choose Yes, Purchasing checks to see if a sourcing rule is assigned to the item at the item level:

- If no sourcing rules exist for the item, Purchasing generates a sourcing rule automatically, allocating 100 percent to the supplier importing the information.
- If a sourcing rule exists for the item, Purchasing compares the effectivity dates of the incoming document with those of the existing sourcing rule for the item. To ensure that only one sourcing rule is used for the item, Purchasing does the following:

If the effectivity dates of the incoming document are the same as the existing sourcing rule's effectivity dates, Purchasing checks to see if the supplier is in the Approved Supplier List. If not, Purchasing adds the supplier to the existing sourcing rule with an allocation of 0 percent. Later, you can query the sourcing rule and define your own percentage splits between suppliers.

If the effectivity dates of the incoming document are different than the existing sourcing rule's effectivity dates, but are within or overlap the existing effectivity dates, then no new sourcing rule is created that will conflict with the existing sourcing rule.

If the effectivity dates of the incoming document do not overlap the existing sourcing rule's effectivity dates, Purchasing updates the item's sourcing rule with the new effectivity dates, adding the supplier at an allocation of 100 percent.

See: Receiving Price/Sales Catalog Information Electronically and Purchasing Documents Open Interface.

Assigning Sourcing Rules and Bills of Distribution

When you enter an Assignment Set name in the Sourcing Rule/Bill of Distribution Assignments window, make sure you use the same name that appears (or that you've provided) in the profile option MRP: Default Sourcing Assignment Set.

Tax Defaults in Purchasing

In the section How Tax Defaults Affect Purchasing Documents, one of the points listed reads as follows:

- Once you created a purchase order shipment and a tax name has already been defaulted onto the shipment, if you change any of the tax sources (for example, the Supplier or Site on a purchase order header), Purchasing will not automatically update the tax name. For example, if you change a Supplier or Site after a Tax Name has already defaulted onto the purchase order shipment, you will have to manually update the Tax Name for the new Supplier or Site you entered.

Instead, it should read as follows:

- If you change any of the tax sources (for example, the Supplier or Site on a purchase order header) when you create a purchase order, Purchasing defaults a new Tax Name corresponding with the new tax source on all new shipments you create but does not use the new Tax Name on previous shipments you created.

- If you override a defaulted Tax Name on the shipment you're currently entering and then change any of the tax sources (such as Supplier or Site) on the purchase order, Purchasing does not default a new Tax Name.

See: How Tax Defaults Affect Purchasing Documents.

Upgrade Notifications to Release 11 Process

In Release 11, document approval is handled by Oracle Workflow technology. Because of Workflow, the Notifications window in Purchasing has been replaced by a new Notifications Summary window, and all notifications are Workflow notifications. Release 11 recognizes your existing notifications only if you upgrade them to Workflow notifications. This is what the Upgrade Notifications to Release 11 process does. It routes your existing documents that are pending approval through the new approval workflow processes, so that their notifications become Workflow notifications.

☞ **Attention:** You need to run this process only if you're upgrading from a previous release of Purchasing. See: *Oracle Applications Upgrade Manual*.

See:

Approval Workflows

Viewing and Responding to Notifications

Viewing Changes to Purchase Orders

You can view at a glance all past revisions made to archived purchase orders through the PO Change History menu item in the Oracle Purchasing Navigator. This menu item uses a Web browser to display the archived revisions. You can compare the current purchase order with a previous revision or view all past changes to the purchase order. You can see what fields changed and what the fields were before and after the change. This menu item is also part of Oracle Self–Service Web Applications, if you have access to the Purchasing responsibility within Oracle Self–Service Web Applications.

To navigate to this window from the Oracle Purchasing responsibility, choose Purchase Orders > PO Change History.

See also: .

Quick Access to Particular Purchase Orders or Requisitions

Please note the following additional information about purchase orders or requisitions placed in the Oracle Applications Navigator.

Once you place a document in the Navigator, it is the first thing you see in the Navigator the next time you log into Purchasing. Choose Functions to return to the Purchasing menu.