Carr Instructional Design Client Redacted

Oracle Basic Navigation Student Training Guide using the UPK Authoring tool



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Overview and Scope of CLM - Miscellaneous Obligations Training

Overview:

Users responsible for managing Miscellaneous Obligation activities utilize the Oracle Contract Lifecycle Management (CLM) module. A Miscellaneous Obligation is not a procurement action and does not require a contract. However, they need other supporting documents to authorize the obligations of funds (i.e. 1164, SF-182, Training Request, SF-1034, etc.). This Training Guide focuses on the entire contract life-cycle management functional processes for Miscellaneous Obligations. This end-to-end lifecycle for Procure to Pay (P2P) transactions in APPLICATION includes requesting, tracking, procuring, receiving, and paying for goods or services in support of CLIENT's mission. This Training Guide focuses on the use of Miscellaneous Obligations as a procurement mechanism.

The CLM module is a fully integrated procurement system designed to meet the needs of federal agencies. CLM allows the user to record procurement transactions from the creation of an Acquisition Plan Summary (APS) through contract closeout. The integrated solution streamlines the procurement process.

During this course, CLIENT CLM users will learn how to complete activities for Miscellaneous Obligations associated with the following functions and functional areas:

- Demand Workbench
- Workload Assignments and Milestones
- Miscellaneous Obligations

Demand Work Bench:

The Demand Workbench tab of the Buyer Work Center identifies Purchase Requisition/Amendment Lines and Post Award Requests (PARs) that have yet to be sourced or awarded. The Demand Workbench serves as the starting point for contracting personnel to fulfill the requests submitted by a Requester. From within the Demand Workbench, contracting personnel can review the Requisition Lines to ensure the Requisition package is complete and elect to return the Requisition to the requester in the case where additional information is needed.

Once the Requisition package is determined complete, contracting personnel can create Workload Assignments, initiate Awards, and add funding from Requisition Lines to existing draft Awards/Modifications.



CLM Awards:

CLM provides the ability to create and manage Miscellaneous Obligation Awards as part of the procurement process. The Awards are contractual vehicles put in place between the government and a Supplier for the purpose of procuring goods or services. There are multiple ways within the application to initiate an Award. Each Award contains:

- Header level information that pertains to the Award as a whole
- Line level information to include specific information about the items/services being procured
- Shipping and accounting data

Oracle Roles and Responsibilities:

This Training Guide addresses functions performed by users with the following CLIENT Organization Roles and Oracle Responsibilities:

System Role	Role Description	System Responsibilities
P& C CLIENT Contracting Specialist (KS)	Users with this role will be able to create solicitations, solicitation amendments, awards, and modifications, including creating FPDS-NG records, and perform close outs. Users with this role will not be approving awards and modifications.	CLIENT Contracting Specialist (KS)
CLIENT Miscellaneous Obligation Preparer	The Miscellaneous Obligation Preparer Role allows users with this responsibility to perform all activities of the miscellaneous obligation preparer. They cannot approve as they do not have a system warrant. Users with this responsibility enter obligations (including miscellaneous obligations, reimbursable interagency agreements, and leases doc styles), but does not approve. They cannot view/create solicitations in CLM and cannot view/record select offers in CLM.	CLIENT Miscellaneous Obligation Preparer
CLIENT Miscellaneous Obligation Approver	The Miscellaneous Obligation Approver Role allows users to obtain funds on behalf of the government. This responsibility authorizes user to view, create, approve, and print obligation documents (including miscellaneous obligations, reimbursable interagency agreements, and leases) in the financial system. Users with this responsibility have a system warrant and approve the obligation document. They	CLIENT Miscellaneous Obligation Approver



System Role	Role Description	System Responsibilities
	cannot view/create solicitations in CLM and cannot view/record have selected offers in CLM.	
CLIENT BI Inquiry	Allows all users to run / view Oracle Business Intelligence (OBIEE) reports	CLIENT BI Inquiry

Note: The data values utilized in the functional processes (scenarios) included in this Training Guide are for **<u>illustration purposes only</u>**. Utilize actual data values when performing these functions in the Production environment.

Lesson 1: Establishing User Preferences

1.1 Establishing User Preferences

This overview lesson will demonstrate the steps to view and manage your user preferences via the **Settings** icon after navigating to the **Demand Workbench**.

Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to define their user preferences.

Scenario: You are a Miscellaneous Obligations user within the Organization and want to define your user preferences to minimize future data entry for data elements (Office and Contact defaults) that are consistently the same.

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Worklist			
Field List \$\$\$ \$\$\$\$ \$\$\$\$ \$			
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Step	Action
1.	This lesson begins at the APPLICATION Home Page.
	Refer to the APPLICATION Navigation Course (Understanding the Oracle Home Page and Accessing the Oracle Financial Applications topic 2.1) for detailed steps on how to navigate to this page.

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UCG Miscellaneous Obligation Preparer	There are no notifications in this view.	t Due							
	STIP Vacation Rules - Redirect or auto-respond to notification	ions.							
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Step	Action
2.	After logging into the application, the Oracle Home Page displays and the user must select the applicable responsibility.
	For this scenario, utilize the CLIENT Miscellaneous Obligation Preparer link.
	UCG Miscellaneous Obligation Approver
	UCG Miscellaneous Obligation Preparer

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Step	Action
3.	Click the Buyer Work Center link.
	Attachments
	Buyer Work Center
	Awards

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Home							
Navigator	Worklist						
Personalize	Full List						
UCG Miscellaneous Obligation Approver	∭ 2 5 \$ \$ ₹ ■ From Type Subject Sent Due						
LCG Miscellaneous Obligation Preparer Notifications Summary	There are no notifications in this view.						
Item Search	TIP <u>Vacation Rules</u> - Redirect or auto-respond to notifications.						
Supplier Summary							
Requests							
Umbrella Programs							
Personal Profiles							
28 Attachments							
a 🖿 Buyer Work Center							
Demand Workbench							
Workload Assignments							
Awards							
Suppliers							
Contract File							
Protests							
Awards							
Management							
Accounting							
Reports							Ι.



Step	Action
4.	Click the Demand Workbench link.
	A 🛅 Buyer Work Center
	Demand Workbench
	Workload Assignments

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Step	Action							
5.	The Demand Workbench page displays.							
	Use the Settings icon to navigate to Preferences.							
	Click the Settings (Gear) icon.							

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Step	Action
6.	Click the Preferences link.
	Preferences

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Demand Workbench Assignmen	ts Awards IDVs Deliverables Negotiations Suppliers Contract Administration
General	General Preferences Cancel Reset to Default Apply
Display Preferences	Languages
- Application Catalog Preferences	Current Session Language American English 🔍 🕦 Default Application Language American English 💌 🕦 Accessibility
Purchasing CLM Defaults	Accessibility Features None 🔽 🗊
Application Catalog Preferences Purchasing Defaults	Home Page Style Framework Tree V j) Page Header Display Style Icons Only V Top-level Menu Display Style ILinis Only V j) Access Kevs
	Disable Access Keys TIP Select this check box to disable access keys in all accessibility modes. Regional
	Territory United States Date Format d3-MMM-Myry (14-Dec-2019) Timezone (1407 - 500 Eastern Time Number Format 10,000 00 Currency Cu
	Known As Old Password



Step	Action								
7.	The General Preferences page displays.								
	Refer to the APPLICATION Navigation Course (Understanding Roles and Responsibilities topic 7.3) for detailed steps on how to update General Preferences on this page.								
8.	For this scenario, use the Purchasing CLM Defaults feature to update user preferences.								
	Click the Purchasing CLM Defaults link.								
	Catalog Preferences								
	Purchasing CLM Defaults								

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Demand Workbench Assignments	s Awards IDVs Deliverabl	es Negotiations Suppliers	Contract Administration							
General	Offices and Contac	t Defaults						C	anceļ	Apply
Display Preferences	Offices and Contact I	Defaults								
Application	💢 22 🕞 🕸 🗸 🖩									
Catalog Preferences	Office Type	Location	Contact							
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Purchasing CLW Defaults	Invoice Office	<u>ы</u> Ф.	_⊔ Q							
Application	Issuing Office	31 Q	²¹ ď							
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Catalog Preferences	Property Administration Office	<u>ا</u> م	Q,							
Purchasing Defaults	Requesting Office	<u>ы</u> Q	J Q							
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	Administration Office	Q	Q							
	Contracting Officer			ī						
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Step	Action							
9.	The Offices and Contact Defaults page displays.							
	The Page consists of:							
	• Offices and Contract Defaults : Use this section to enter the commonly used office locations and contact information when creating documents							
	 Contracting Officer: Use this field to enter the commonly used Contracting Officer: Use this field to enter the commonly used Contracting 							
	Officer when creating documents.							



Step	Action					
10.	Click the COR Office: Location Search and Select icon.					
	COR Office					

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Search and Select: Location	Cancel Select					
Search						
To find your item, select a filter item in the	pulldown list and enter a value in the	text field, then select the "Go"	button.			Cancel Apply
Search By Location Code 🗸	Go					
Results			_			
Quick Select	Location Code	Town/City	Country			
No search conducted.						
			🔍 100% 🔻 🔡			
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Step	Action						
11.	The Search and Select: Location page displays in a new window.						
	Use the Search By field to search for the COR Office .						
	Click in the Search By field.						
	Search By Location Code 🗸 Go						
12.	Enter the desired information into the Search By field.						
	Search By Location Code						
13.	Click the Go button to initiate the search.						
	USCG% Go						

Search	and Select: Lo	cation	dale / Joac mining in a Joac comign	Cancel Select	\$	
Search			curcej serec			
To find y Search I Results	rour item, select a filter ite By Location Code 💌	em in the pulldown list and enter a valu USCG% Go	e in the text field, then select the "Go	" button.		
	Quick Select	Location Code	Town/City	Country		
0		USCG Headquarters	Washington	US		
				ब्द् 100% र ्य		
-		Contracting Officer	N 9			

Step	Action								
14.	The search results display, and the user must select the applicable Location.								
15.	15. Use the Quick Select icon for the CLIENT location to populate the Loca field.								
	0		USCG Headquarters						

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Demand Workbench Assignment	s Awards IDVs Deliverable	es Negotiations Suppliers	Contract Administration							
General	Offices and Contac	t Defaults						Ca	nceļ	Apply
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Application	🗮 😂 🖻 🌞 💷									
Catalog Preferences	Office Type	Location	Contact							
	COR Office	USCG Headquarters 🔄 Q	_⊨ Q.							
Purchasing CLM Defaults	Invoice Office	<u>ا</u> م	Q,							
	Issuing Office	<u></u> 2	<u>ы</u> Ф.							
Application	Payment Office	<u>ا</u> م	Q,							
Catalog Preferences	Property Administration Office	<u>ا</u> م	<u>ا</u> م							
Purchasing Defaults	Requesting Office	Q,	Q							
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Step	Action
16.	The Offices and Contact Defaults section redisplays with the selected value.
	Users can also define a default Contracting Officer in the Contracting Officer field.
17.	Use the Apply button to save the changes, once all updates are complete.
	Click the Apply button.
	Cance <u>I</u> Apply

nand Workbench Assignments	Awards IDVs Deliverable	s Negotiations Suppliers	Contract Administration				
General	Confirmation						
Display Preferences	Office Preferences Values	Applied					
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Application	Offices and Contact D	efaults					
Catalog Preferences							
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Catalog Preferences	Issuing Office	<u>ا</u> م	ي <i>و</i>				
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	SBA Office	<u>ا</u> م	Q.				
	Administration Office	<u>ا</u> م	Q,				
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Step	Action
18.	A Confirmation message displays indicating that the preferences have been applied.
19.	Click the Home icon to return to the Oracle Home Page.

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Home											l
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European Contractions Deligation Approver European Colligation Approver Motifications Summary European Summary European Summary Requests Undretle Programs Personal Profiles Attachments European Workbench Orenand Workbench Orenand Workbench Supplets Contract File Protests Management Management	Image: Solution of the second sec	Subject Sent	ons.								
Reports											

Step	Action
20.	The APPLICATION Home Page redisplays.
21.	End of Procedure.



1.2 Creating Vacation Rules

Utilize vacation rules to delegate some or all notifications to another user for a specified timeframe. Click on the **Vacation Rules** hyperlink to access the set-up wizard, which walks the user through the process of establishing criteria to send a user's notifications to alternative users when they are out of the office.

In this lesson, the steps to create and manage a vacation rule are demonstrated.

Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to establish vacation rules that will allow another user to act on their behalf for a temporary period.

Scenario: You are a Miscellaneous Obligations user and are planning to take a vacation that begins next Monday. Today is the Friday before your vacation and you will need to establish a vacation rule prior to leaving the office.

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UCG Miscellaneous Obligation Approver	From	Туре	Subject	Sent	Due			
UCG Miscellaneous Obligation Preparer	There are no notifications in this view.							
	TIP Vacation Rules - Redi	rect or	auto-resp	ond to	notificatio	ons.		
								~
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Step	Action
1.	This lesson begins at the Oracle Home Page .
	Refer to the APPLICATION Navigation Course (Understanding the Oracle Home page and Accessing the Oracle Financial Applications topic 2.1) for detailed steps on how to navigate to this page.
2.	After logging into the application, the Oracle Home Page displays, use the Vacation Rules link to access the Vacation Rules page.
	Click the Vacation Rules link.
	Vacation Rules Redirect or auto-respond to notifications.

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Home >						-				
Vacation Rules										
Create Rule 🗮 😂 📧 🌣 🔻 💷										
Rule Name	a Dula huttan	to oronto c	n nov natifi	action routin	a rulo	Item Type	Notification	Update	Delete	Status
Tou have not setup any notification routing fules. Flease use the create	s Rule Dutton	to create a	a new noun	cauon rouun	ig rule.					
Return to Worklist										
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Step	Action
3.	The Vacation Rules page displays.
	Any previously created vacation rules will display. For this scenario, no rules have been setup.



Step	Action
4.	Click the Create Rule button.
	Create Rule 🛒 🌫 🖾 🌣 🔻 💷

	Â	*	0	≜ ¹	Logged In As UCGMISCOBSTRAIN01 ?
Item Type Vacation Rule: Item Type	Notification				Rule Response
Select the type of notification that will activate this rule. Item Type -All- If "-All-" is selected, you will skip to Step 3.					
Return to Vacation Rules					Step 1 of 3 Ne <u>xt</u>
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Step	Action
5.	The Vacation Rule: Item Type page displays. This is step 1 of the set-up wizard.
	Use this page to identify the type of Notifications to reassign.
	The Item Type field defaults to "All". Based on the user's responsibilities, there may be other options available for selection.
	A selection of "All' will reassign all Notifications. With this selection, the set-up wizard will proceed to step 3 when the user clicks the Next button.
	A selection of any other Item Type will reassign only that type of Notification. With this selection, the set-up wizard will proceed to step 2 to select the potification format that will activate the rule when the user clicks the
	Next button.



Step	Action
6.	For this scenario, the default selection of "All" will be utilized.
	Click the Next button. Step 1 of 3 Next

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O Item Ty	pe	Notification			Rule Response
vacation Rule:	Response				
 Indicates required tiel Item Type Notification * Start Date * End Date Message Transfer 	d All All 13-Dec-2019 11:14:34 (example: 14-Dec-2019 11:14:34) Comments will display with each routed not All Employees and Users	fication V		p _k	Cancel Back Step 3 of 3 Apply
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Step	Action
7.	The Vacation Rule: Response page displays. This is step 3 of the set-up wizard.
	Use this page to:
	\circ Define the start and end date for the vacation rule period
	 Identify the user to whom the Notifications will be transferred to

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Item Ty	pe Posnonso	Notification				Rule Response
* Indicates required fiel	d					
Item Type Notification * Start Date	All All 13-Dec-2019 11:14:34 🐞					
* End Date Message	(example: 14-Dec-2019 11:14:34)					
Transfer	Comments will display with each routed notification All Employees and Users	•	, 	ي م		
						Cance! Back Step 3 of 3 Apply

Step	Action
8.	The Start Date field defaults to the current system date.
	This date can be updated as needed.
9.	Click the End Date Calendar icon.
	* End Date



Step	Action
10.	The Calendar page displays in a new window and the user must select the end date by clicking on the corresponding date link.

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Item T	ype	Notification				Rule Response
* Indicates required fie						
Indicates required in Item Type Notification * Start Date Message () Transfer	All All 13-Dec-2019 11:14:34 (coample: 14-Dec-2019 11:14:34) 19-Dec-2019 11:17:17 Comments will display with each routed notification All Employees and Users			ي <i>و</i>		Cancel Back Step 3 of 3 Apply
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Step	Action
11.	The Vacation Rule: Response page redisplays with the selected end date.
	Optionally, use the Message field to enter comments pertaining to why the Notifications are being reassigned. Any comments entered are forwarded along and viewable with all of the reassigned Notifications.
12.	Enter the appropriate information into the Message field.
	Message

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Item T		Notification				Rule Response
* Indiation Rule.	Response					
Indicates required file Item Type Notification * Start Date * End Date Message	Id All 13-Dec-2019 11:14:34 (example: 14-Dec-2019 11:14:34) 19-Dec-2019 11:17:17 During my vacation, please approve all my no Comments will diplay with each routed notification All Employees and Users	Dtifications.		ی م اد]	Cancel Back Step 3 of 3 Apply
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Step	Action
13.	The Transfer field defaults to All Employees and Users . This selection gives the selected user complete ownership of specified notifications while the vacation rule is active.
14.	Next, identify the individual to whom the notifications will be transferred to. Click the Transfer Search and Select (magnifying glass) icon.
	Transfer All Employees and Users

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Searc	h and Select: User or Role			Cancel Sele	ect
Searc	h				esponse
To find	d your item, select a filter item in the pulldown	n list and enter a value ir	the text field, then select the	"Go" button.	
Search	By Name	Go			
Resul	ts				_
	Quick Select	Name	User Name	Email	
					e <u>l</u> Bac <u>k</u> Step 3
				a 100%	▼

Step	Action
15.	The Search and Select: User or Role page displays in a new window.
	Click in the Search By field.
	Search By Name 🗸 Go
16.	Enter the appropriate information into the Search By field.
	Search By Name 🗸 Go
17.	Click the Go button to initiate the search.
	Search By Name V USCG% Go

Search and Se	E-Business Suite - EBSITRN .dc2.dhs.gov:4470/?_t=fredRC&enc=U elect: User or Role	TF-8&_minWidth=750&_minHeight=!	550&configNam —	×
Search				esponse
To find your item, sel Search By Name Results	elect a filter item in the pulldown list an	d enter a value in the text field, then so	elect the "Go" button.	
Quick	Select Name	User Name	Email	
0	USCGGLTRAIN01	USCGGLTRAI	N01	
0	USCGGLTRAIN02	USCGGLTRAI	N02	
			र्द्ध 100	e <u>l</u> Bac <u>k</u> % ▼ .

Action							
The search results display.							
Use the Quick Select icon to select the user that the notifications will be transferred to.							
Quick Select	Name						
	USCGGLTRAIN01						
	Action The search results display Use the Quick Select icor transferred to. Quick Select	Action The search results display. Use the Quick Select icor to select the user that the notification of the select to. Quick Select Name Image: Comparison of the select transferred to. Use Comparison of the select transferred to.					

	€ E-Business Suite - EBSI	TRN	î ★	٢	1	Logged In As UCGMISCOBSTRAIN01 🥎
Item T	ype Response	Notific	cation			Rule Response
Indicates required fie	ld					
Item Type Notification * Start Date * End Date Message Transfer	All All (3-Dec-2019 11:14:34 (example: 14-Dec-2019 11:14:34) 19-Dec-2019 11:17:17 During my vacation, please app Comments will display with esch router All Employees and Users	the field of the f	is.	يا ر]	
					-	Cancel Back Step 3 of 3 App

Step	Action
19.	The Vacation Rule: Response page redisplays with the user.
20.	Click the Apply button to and apply the vacation rule.
	Cancel Back Step 3 of 3 Apply

		â	*	•	↓ ¹	Logged In As UCG	GMISCOBSTRA	IN01 🥎	ባ
Home > Vacation Rules									
Create Rule 🔟 🎜 🖙 🔅 🔻 💷									
Rule Name	Item Type		Notifica	tion		Update	Delete	Status	
Transfer: USCGGLTRAIN01	<all></all>		<all></all>			1	Î	Active	
Return to Worklist									
Copyright (c) 1998, 2017, Oracle and/or its affiliates. All rights rese	rved.							Privacy	Statement

Step	Action
21.	The Vacation Rules page redisplays with the newly created vacation rule. This vacation rule was set up to begin immediately (current system date as the start date). Therefore, the status is " Active ".
22.	Click the Home icon to return to the Oracle Home Page.

RACLE [®] E-Business Suite - EBSITRN2	*	¢	 0	Log	ged in As UCGMI	SCOBSTRAIN01	?	
erprise Search Contract Documents 🔽			Go	Se	earch Results Dis	play Preference	Standard	🗸
me								
Navigator	Worklist							
Personalize			[Full List				
LICC Missellenseure Obligation Approver	💢 😂 🖙 🏟 🔻 💷							
	From	Type Subject	t Sent D)ue				
UCG Miscellaneous Obligation Preparer	There are no notifications in this view							

Step	Action
23.	The Oracle Home Page redisplays.
24.	End of Procedure.



1.3 Deleting Vacation Rules

Utilize vacation rules to delegate some or all notifications to another user for a specified timeframe. Vacation rules can be deleted when they are no longer needed.

In this lesson, the steps to delete a vacation rule are demonstrated.

Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to delete vacation rules to remove the ability for another user to act on their behalf after the vacation rule was created.

Scenario: You are a Miscellaneous Obligations user and you need to delete a vacation rule that is no longer needed.

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Enterprise Search Contract Documents				Go		Search Results Display Preferen	ce Standard	\checkmark
Home								
Navigator	Worklist							
Personalize					Full Li	st		
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UCG Miscellaneous Obligation Approver	From	Type Su	bject	Sent I	Due			
UCG Miscellaneous Obligation Preparer	There are no notifications in this view.							
	ØTIP Vacation Rules - Redi	rect or aut	o-respo	nd to r	notificatio	ons.		
								Ň
(>

Step	Action
1.	This lesson begins at the Oracle Home Page . Refer to the APPLICATION Navigation Course (Understanding the Oracle Home page and Accessing the Oracle Financial Applications Topic 2.1) for detailed steps on how to navigate to this page.



Step	Action
2.	After logging into the application, the Oracle Home Page displays, use the Vacation Rules link to access the Vacation Rules page.
	Click the Vacation Rules link. Image: Second Secon





Step	Action
3.	The Vacation Rules page displays with the vacation rule which currently has a status of " Active ".
	The following actions can be performed on existing vacation rules in either an " Active " or " Inactive " status:
	 Update: Click the corresponding Update (pencil) icon. This will open the Vacation Rule: Response page and the user can update the vacation rule as needed Delete: Click the corresponding Delete (trashcan) icon. This will delete the vacation rule. If the vacation rule is currently "Inactive", it will never begin. If currently "Active", the effective period for Notification reassignment will be terminated immediately.
4.	Click the Delete icon.
	Delete

	î	★	0	↓ ¹	Logged In As UCGMISCOBSTRAIN01
<u> </u> Warning					<u>N</u> o <u>Y</u> es
Delete Vacation Rule: Transfer: USCGGLTRAIN01					
Copyright (c) 1998, 2017, Oracle and/or its affiliates. All rights reserved.					Privacy Statement



Step	Action
5.	A Warning message displays indicating the vacation rule has been selected for deletion.
	Click the Yes button.
	<u>No</u> <u>Y</u> es

	â	*_	្	4 ¹	Logged In As UCGMIS	COBSTRAINO	1 ?	¢
Home > Vacation Rules								
Create Rule 10 2 5 5 5 V								
Rule Name					Item Type Notifica	tion Update	Delete	Statu
You have not setup any notification routing rules. Please use the Create	e Rule button to crea	ate a new	notification	routing rule.				
Return to Worklist								
•								
yright (c) 1998, 2017, Oracle and/or its affiliates. All rights reserved.							Privac	y Staten

Step	Action
6.	The Vacation Rules page redisplays, and the vacation rule is removed.
7.	Click the Home icon to return to the Oracle Home Page.

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UCG Miscellaneous Obligation Preparer	There are no notifications in this view				
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Step	Action
8.	The Oracle Home Page redisplays.
9.	End of Procedure.



Lesson 2: Demand Workbench

2.1 Demand Workbench Overview

The Demand Workbench page (tab) of the **Buyer Work Center** is used to identify and manage approved Purchase Requisition Lines, Amendment Lines, and PARs. The Demand Workbench is the centralized point from which key acquisition functions, such as initiating workload assignments, searching for Requisition Lines, and generating Miscellaneous Obligations are performed.

Users with either the CLIENT Miscellaneous Obligations Preparer or CLIENT Miscellaneous Obligations Approver responsibility have access to the Demand Workbench.

2.2 Using Saved Searches on the Demand Workbench Page

This lesson demonstrates the steps for using the Saved Searches functionality on the **Demand Workbench** page to locate Requisition Lines based on predefined search criteria.

Users with either the CLIENT Miscellaneous Obligations Preparer or CLIENT Miscellaneous Obligations Approver responsibility can perform this process.

Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to locate Requisition Lines on the **Demand Workbench** page using the Saved Searches functionality.

Scenario: You are the Miscellaneous Obligations user responsible for assigning Requisition Lines to Buyers to initiate procurement activities. Using the CLIENT Miscellaneous Obligation Preparer responsibility, you will identify the unassigned Requisition Lines using a saved search.

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Enterprise Search Contract Documents V	Go Search Results Display Preference Standard V
Home	
Navigator	Worklist
Personalize	Full List
	(2) 22 📧 🔅 ▼ 🔟
UCG Miscellaneous Obligation Approver	From Type Subject Sent Due
OCG Miscellaneous Obligation Preparer	There are no notifications in this view.
	TIP Vacation Rules - Redirect or auto-respond to notifications.
	· · · · · · · · · · · · · · · · · · ·

Step	Action
1.	After logging into the application, the Oracle Home page displays all the responsibilities assigned to the user within the Navigator section.
	Click the CLIENT Miscellaneous Obligation Preparer responsibility to complete this process. Navigator
	Personalize UCG Miscellaneous Obligation Approver UCG Miscellaneous Obligation Preparer

RACLE [®] E-Business Suite - EBSITRN2	🛨 🔅 🄎 Logged in As UCGCLMTRAIN01 🥎
erprise Search Contract Documents V	Go Search Results Display Preference Standard
Navigator	Worklist
Personalize	Full List
UCG Miscellaneous Obligation Approver	
UCG Miscellaneous Obligation Preparer	From Type Subject Sent Due There are no notifications in this view.
Notifications Summary	
Item Search	
Supplier Summary	
🚾 Requests	
Umbrella Programs	
Personal Profiles	
Attachments	
Buyer Work Center	
Awards	
Management	
Accounting	
Equation Reports	

Step	Action
2.	The functions display.
	Click the Buyer Work Center link. Attachments Buyer Work Center Awards

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Navigator	^ Worklist					
Personalize				Full List		
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UCG Miscellaneous Obligation Approver	From	Туре	e Subject	Sent Due		
UCG Miscellaneous Obligation Preparer	There are no not	ifications in this view.				
Notifications Summary	TIP Vacation	Rules - Redirect or auto-res	nond to no	tifications		
Item Search	Vin <u>Vacatori</u>		pond to no	uncutoris.		
Supplier Summary						
Requests						
Umbrella Programs						
Personal Profiles						
Attachments						
A Buyer Work Center						
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Demand Workbench						
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Demand Workbench Workload Assignments Awards						
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Guerrand Workbench Workbanch Workbanch Awards Contract File Protests Management Accounting						

Step	Action														
3.	The Buyer Work Center functions display.														
	Click the Demand Workbench link.														
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] UC	G	⇒	11410CC21000008, 00	02	458- Whitwater Boat crew helmet - Large		⇒ Q	3	Each	77.6				
] UC	G	•	11410CC21000008, 00	03	610 - Raintec gear with CG marking - Large		∃ Q	3	Each	169.8				
) uc	CG	⇒	11410CC210000005, 00	03	Installation of Hull Stern Door for (WMSL- Class) See Reference A-A-A425 checklist		[⊯] Q			950				
] UC	G	•	11503CC210000019, 00	01	test test		_∐ Q	15	Each					~

Step	Action
4.	The Demand Workbench page displays with the Requisitions/MIPR Others tab displayed by default.
	Use the Saved Searches section of the Demand Workbench page to view Requisition Lines based on a saved search.
	Note : The Saved Search field defaults to the "My Requisitions" saved search unless the user has personalized the default view. Refer to "Personalizing Saved Searches on the Demand Workbench Page" for more information on personalizing saved searches.
5.	Click the Saved Search dropdown button. Saved Search My Requisitions

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tep	Action
6.	The available saved searches display. Use these saved searches to search for Requisition Lines that meet the following criteria:
	 My Late Requisitions: Requisition Lines where the need by date is prior to current system date
	 My Requisitions: Requisition Lines assigned to the user (Buyer)
	 My Requisitions for Goods: Requisition Lines for goods assigned to the user
	 My Requisitions for Services: Requisition Lines for services assigned to the user
	 My Requisitions Requiring Solicitation: Requisition Lines that require a Solicitation
	 My Requisitions with a New Supplier: Requisition Lines that suggest a Supplier that has not yet been defined in the system
	 My Requisitions with a Suggested Supplier: Requisition Lines that are sourced to a suggested Supplier
	 My Urgent Requests: Requisition Lines that the Requester marked as urgent
	 Unassigned Requisitions: Requisition Lines that have not been assigned to a Buyer
	Note: Any personalized saved searches that have been created by the user will
	also display.
7.	To view Requisition Lines eligible for assignment, click the Unassigned
	Requisitions list item.
	My Requisitions with a Suggested Supplier My Urgent Requisitions Unassigned Requisitions

		/MIP	R Others	Summary	Amendme	ents Post	Award Requests	MIPR Own								
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						Stern Door for										
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						A-A-A425										
						checklist										
	UCG	⇒	11503CC2	210000019, 0001		test test		, ⊇ Q	15	Each						

Step	Action				
8.	Click the Go	button to initiate the search.			
	Saved Search	Unassigned Requisitions	~	Go	Personalize

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							Boat Crew Survival Vest (Orange) Contains five (5) pockets sized to fit the equipment requirements									
	UCG	⇒	11	503CC210000039	9, 0001		specified in		⇒ Q	30	Each					

Step	Action
9.	The search results are displayed within the Requisitions table. Repeat these steps as needed to view Requisition Lines based on a different saved search.
10.	End of Procedure.

2.3 Personalizing Saved Searches on the Demand Workbench Page

This lesson demonstrates the steps for creating a personalized saved search for use on the **Demand Workbench** page.

Users with either the CLIENT Miscellaneous Obligations Preparer or CLIENT Miscellaneous Obligations Approver responsibility can perform this process.

Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to create a personalized saved search.

Scenario: You have determined that the existing saved searches do not yield your desired search results. Using the CLIENT Miscellaneous Obligation Preparer responsibility, you will create a personalized saved search to display Requisition Lines that yield search results based on your personal preference/need. Specifically, you will create a personalized saved search that will display all unassigned Requisition Lines for goods.

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equ	isition	s/MIP	R Others	Summar	ry A	mendme	nts Post	Award Reque	sts MIPR Ow	/n							
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	UCG	•	11410CC	C21000008,	0001		217- Boat crew survival vest - Large		ji Q	1 3	Each	112.4					
	UCG	⇒	11410CC	21000008,	0002		458- Whitwater Boat crew helmet - Large		j Q	. 3	Each	77.6					
	UCG	¢	11410CC	21000008,	0003		610 - Raintec gear with CG marking - Large		L C	3	Each	169.8					
	UCG	•	11410CC	C210000005,	0003		Installation of Hull Stern Door for (WMSL- Class) See Reference A-A-A425 checklist		2 Q	L.		950					
	UCG	⇒	11503CC	210000019,	0001		test test		o الا	15	Each						

1. This lesson begins at the Demand Workbench page.	
Refer to the "Using Saved Searches on the Demand Workbench Page" for t detailed steps on how to navigate to this page.	the



Step	Action	
2.	Click the Personalize button to modify an existing saved search or create a ne personalized saved search.	w
	Saved Search My Requisitions Go Personalize	

lect	Saved Search:	Duplicate	Create Saved Search	4 Prev	rious 1-10 of	12 🗸	Next 2
elect	Saved Search	n Name	Description	Display Saved Search	Default	Update	e Delete
С	Issuing Office o (70Z023)	f CG-9124	Issuing Office of CG-9124 (70Z023) requisitions	Yes		1	Î
С	Issuing Office ((70Z023)	G-9124	Displays the requisitions that are not assigned to any buyer.	Yes 🗸		1	Î
С	Issuing Office 7	0Z045	Displays Issuing Office 70Z045 requisitions that are not assigned to any buyer.	Yes	Set by User	1	Î
)	My Late Requis	itions	Displays the requisitions for the current buyer with default category, that are past the need by date.	Yes		0	1
)	My Requisitions	s for Goods	Displays the requisitions for the current buyer with default category, default ship-to location and 'Goods' as purchase basis.	Yes		0	1
C	My Requisitions	s for Services	Displays the requisitions for the current buyer with default category, default ship-to location and 'Services' or 'Temp Labor' as purchase basis.	Yes		0	1
)	My Requisitions Supplier	s with a New	Displays the requisitions for the current buyer with default category, that have a new supplier.	Yes		0	Ĩ
С	My Requisitions Suggested Sup	s with a plier	suggested supplier.	Yes		0	Î
C	Unassigned Re	quisitions	Displays the requisitions that are not assigned to any buyer.	Yes		0	Î
C	My Urgent Req	uisitions	Displays the requisitions for the current buyer with default category, that are marked as Urgent.	Yes		Ì	Û
ect	Saved Search:	Duplicate	Create Saved Search		vious 1-10 of	12 🗸	Next 2

Step	Action						
3.	The Personalize Saved Searches page displays.						
	Personalized saved searches are created by either:						
	 Copying an existing saved search and then modifying it as needed (Duplicate button) 						
	 Creating a new saved search from scratch (Create Saved Search button) 						
	This lesson outlines the steps for copying an existing saved search and modifying it to create a new personalized saved search.						



Step	Action
4.	First, select the saved search that will be copied by clicking the corresponding Select radio button.
	O Unassigned Requisitions

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Demand	Workbench /	Assignments	Awards Suppliers				
Requisi	tions/MIPR Oth	ers Sumr	nary Amendments Post Award Requests MIPR Own				
Perso	onalize Sa	ved Sear	ches			Cancel	Apply
Select	Saved Search:	Duplicate	Create Saved Search	4 Prev	ious 1-10 of	12 🗸	Next 2 🕨
Select	Saved Search	n Name	Description	Display Saved Search	Default	Update	e Delete
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0	My Late Requis	itions	Displays the requisitions for the current buyer with default category, that are past the need by date.	Yes		Ì	1
0	My Requisitions	s for Goods	Displays the requisitions for the current buyer with default category, default ship-to location and 'Goods' as purchase basis.	Yes		ð	Ĩ
0	My Requisitions	s for Services	Displays the requisitions for the current buyer with default category, default ship-to location and 'Services' or 'Temp Labor' as purchase basis.	Yes		ð	Ĩ
0	My Requisitions Supplier	s with a New	Displays the requisitions for the current buyer with default category, that have a new supplier.	Yes		Ì	1
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Step	Action
5.	Click the Duplicate button to create a copy of the saved search and modify its attributes.
	Personalize Saved Searches
	Select Saved Search: Duplicate Create Saved Search

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Step	Action
6.	The <b>Duplicate Saved Search</b> page displays with the cursor in the <b>Name</b> field. The <b>Name</b> field defaults as "Duplicate of".
	Enter a unique name for the saved search in the <b>Name</b> field. * Name Duplicate of [Unassigned Requisitions]

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Step	Action						
7.	Users can optionally set this saved search as their default by selecting the <b>Set as Default</b> checkbox option.						
	The <b>Description</b> field defaults with the description of the saved search duplicated. Users can optionally update the description for the personalized saved search.						
8.	Click in the <b>Description</b> field.						
	Description Displays the requisitions that are not assigned to any buyer.						
9.	Enter the applicable information into the <b>Description</b> field.						
	Description Displays the requisitions that are not assigned to any buyer.						

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Step	Action						
10.	Use the Search Criteria section to add any additional filters to the saved search.						
	This lesson demonstrates the steps for adding a new filter to the saved search in order to limit the search to those unassigned Requisition Lines for goods.						
11.	Click the Category Search and Select icon (magnifying glass).						
	Category is						

Search and S	elect: Category			-		Canc	e <u>i</u> Sel	ect			0
earch											
To find your item, s Search By Catego Results	elect a filter item in the pulldov	wn list and enter a va	alue in the text field	, then selec	t the "Go" button				Apply and View R	esults	Apply
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Columns Show	n and Column Order	Columne Dienstavo				6	100%	::	Rename Colum	nns or 1	otaling

Step	Action
12.	The Search and Select: Category page displays in a new window.
	Click in the <b>Search By</b> field.
	Search By Category V Go
13.	Enter the applicable information into the <b>Search By</b> field.
	Search By Category 🗸 Go
14.	Click the <b>Go</b> button to initiate the search.
	Search By Category 🔽 Goods x Go

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Step	Action						
15.	The search results display.						
	Click the <b>Qu</b>	ick Select icon for the	applicable Category	y.			
	Select	Quick Select	Category $ riangle$				
	0		GOODS				

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Step	Action
16.	The <b>Duplicate Saved Search</b> page redisplays. Repeat these steps to add additional filters as needed. Click the vertical scrollbar to scroll down on the page.

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Step	Action
17.	Use the <b>Columns Shown and Column Order</b> section to define the data elements that you want displayed in the search results when using this saved search as needed.

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Step	Action
18.	Within the <b>Columns Displayed</b> section, there are data elements that will be displayed by default for the search results. These can be updated as needed. Additional data elements that can be added are listed within the <b>Available</b>
	Use the move buttons provided to add/remove data elements to or from the <b>Columns Displayed</b> section as needed.

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<b>TIP</b> Columns v	vith totaling capal	pilities sho	wn can only display as	the end column of	the table.			
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						Cancel Revert	Apply and View Results	Apply

Step	Action
19.	Use the <b>Sort Settings</b> section to define any default sort settings that you want to apply to this saved search. This will determine how individual Requisition Lines will be sorted and displayed within the search results.
20.	Click the vertical scrollbar to return to the top of the page.

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Step	Action
21.	Click the <b>Apply</b> button to save these changes and close the <b>Duplicate Saved Search</b> page.
	Cancel Revert Apply and View Results Apply

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Select         Saved Search Name         Description         Display Saved Search         Default         Update           Issuing Office of CG-9124 (702023)         Issuing Office of CG-9124         Isplays the requisitions that are not assigned to any buyer.         Yes         Image: CG-9124         Image: CG-9124 <td< th=""><th>elect</th><th>Saved Search:</th><th>Duplicate</th><th>Create Saved Search</th><th>4 Prev</th><th>ious 1-10 of</th><th>13 🗸 I</th><th>Next 3 D</th></td<>	elect	Saved Search:	Duplicate	Create Saved Search	4 Prev	ious 1-10 of	13 🗸 I	Next 3 D
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My Requisitions with a New Supplier         Displays the requisitions for the current buyer with default category, that have a new supplier.         Yes         Image: Comparison of the current buyer with default category and the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Yes         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category.         Image: Comparison of the current buyer with default category. <thimage: buyer="" category.<="" comparison="" current="" default="" of="" td="" th<="" the="" with=""><td>0</td><td>My Requisitions</td><td>for Services</td><td>Displays the requisitions for the current buyer with default category, default ship-to location and 'Services' or 'Temp Labor' as purchase basis.</td><td>Yes</td><td></td><td>ð</td><td>Û</td></thimage:>	0	My Requisitions	for Services	Displays the requisitions for the current buyer with default category, default ship-to location and 'Services' or 'Temp Labor' as purchase basis.	Yes		ð	Û
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elect Saved Search: Duplicate Create Saved Search	elect §	Saved Search:	Duplicate	Create Saved Search	4 Pres	vious 1-10 of	13 🗸	Next 3

Step	Action
22.	The <b>Personalize Saved Searches</b> page redisplays. Note that the new saved search displays. <b>Note</b> : The system allows users to update or delete any personalized saved searches. The system does not allow users to update or delete the preconfigured saved searches.
23.	End of Procedure.



#### 2.4 Performing Searches on the Demand Workbench Page

This lesson demonstrates the steps for performing searches with specific search criteria on the **Demand Workbench** page.

Users with either the CLIENT Miscellaneous Obligations Preparer or CLIENT Miscellaneous Obligations Approver responsibility can perform this process.

**Objective**: In this lesson, the Miscellaneous Obligations user will learn the steps required to perform searches using the Search functionality on the **Demand Workbench** page.

**Scenario**: Upon review of the existing saved searches, you have determined that the existing saved searches do not yield your desired search results. Using the CLIENT Miscellaneous Obligation Preparer responsibility, you will perform a search for Requisition Lines using specific search criteria.

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		UCG	•	11410CC210000008, 0002		458- Whitwater Boat crew helmet - Large			∃ Q	3	Each	77.6						
		UCG	•	11410CC210000008, 0003		610 - Raintec gear with CG marking - Large			∃ Q	3	Each	169.8						
		UCG	⇒	11410CC210000005, 0003		Installation of Hull Stern Door for (WMSL- Class) See Reference A-A-A425 checklist						950						
		UCG	⇒	11503CC210000019, 0001		test test			⇒ Q	15	Each							~

Step	Action
1.	This lesson begins on the <b>Demand Workbench</b> page. Refer to the "Using Saved Searches on the Demand Workbench Page" lesson for
	the detailed steps of new to having the to this page.



Step	Action
2.	Click the <b>Search</b> button to use the Search functionality.
	Search

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	UCG	•	1141000	21000008,	0001			217- Boat crew survival vest - Large	3	Each	112.49	USD					
	UCG	⇒	11410C0	21000008,	0002			458- Whitwater Boat crew helmet - Large	3	Each	77.68	USD					
	UCG	•	11410C0	21000008,	0003			610 - Raintec gear with CG marking - Large	3	Each	169.88	USD					
								Installation of Hull									~

Step	Action
3.	The <b>Search</b> section displays and enables users to search for Requisition Lines based on specific search criteria.
	When performing searches, users can choose to require the results to match "All" of the search values or allow them to match "Any" of the search values by selecting the applicable radio button.

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	UCG	⇒	11410CC	210000008, 0001			217- Boat crew survival vest - Large	3	Each	112.49	USD						
	UCG	⇒	11410CC	21000008, 0002			458- Whitwater Boat crew helmet - Large	3	Each	77.68	USD						
	UCG	\$	11410CC	21000008, 0003			610 - Raintec gear with CG marking - Large	3	Each	169.88	USD						
							Installation of Hull										

Step	Action
4.	For each search criteria attribute, there is a condition dropdown button. The conditions that appear in the dropdown vary based on the selected attribute. The primary conditions are:
	<ul> <li>Is: Records that have an attribute value equal to the value specified in the criteria</li> <li>Is Not: Records that have an attribute value that is not equal to the value specified in the criteria</li> <li>Is Not (include blanks): Records that have an attribute value that is not equal to the value specified and accepts blanks as valid values</li> </ul>
	After specifying your search criteria, click the <b>Go</b> button to display the results. Optionally, you can click the <b>Clear</b> button to reset the search fields.
5.	The following steps demonstrate the procedure for adding a search parameter and conducting a search. Click the <b>Add Another dropdown</b> button to select and add another search criteria field.
	Add Another Assignment Number Add



Step	Action
6.	The list of values display. Select the desired search criteria field by clicking on the corresponding list item. Rate Type Requester Requesting Office Address

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	UCG	₽	1141000	21000008, 00	102			458- Whitwater Boat crew helmet - Large	3	Each	77.68	USD						
	UCG	₽	11410CC	21000008, 00	03			610 - Raintec gear with CG marking - Large	3	Each	169.88	USD						
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Step	Action	
7.	Click the Ad	d button to add this field as a search criteria field.
	Add Another	Requester  Add

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	UCG	⇒	11410CC210000008,	0001			217- Boat crew survival vest - Large	3	Each	112.49	USD			
			11410CC210000008,	0002			458- Whitwater Boat crew	3	Each	77.68	USD			
	UCG	7					Large							

Step	Action
8.	The field displays as a search criteria field.
	Click in the <b>Requester</b> field to enter the appropriate value.
	Requester is
9.	Enter the appropriate value in the <b>Requester</b> field.
	Requester is
10.	Click the <b>Go</b> button to initiate the search.
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Step	Action
11.	The search results display in the bottom portion of the page.
12.	End of Procedure.



#### 2.5 Returning Requisition Lines to the Requester

This lesson demonstrates the steps for returning a Requisition Line to the Requester when additional information is needed. This process can also be used to return multiple Requisition Lines to their corresponding Requesters simultaneously.

Preparer or CLIENT Miscellaneous Obligations Approver responsibility can perform this process.

**Objective**: In this lesson, the Miscellaneous Obligations user will learn the steps required to return a Requisition Line to the Requester.

**Scenario**: You are a Miscellaneous Obligations user reviewing and assigning Unassigned Requisition Lines to begin procurement activities. Upon review, you determine that additional documentation is required for a Requisition Line. Using the CLIENT Miscellaneous Obligation Preparer responsibility, you will return the applicable Requisition Line to the Requester and indicate the reason for the return.

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Step	Action							
1.	This lesson begins on the <b>Demand Workbench</b> page.							
	Refer to the "Using Saved Searches on the Demand Workbench Page" lesson for the detailed steps on how to navigate to this page.							
2.	To return Requisition Lines to a Requester, select the appropriate Requisition Line(s) by clicking the corresponding Select checkbox(es).							
	<b>Note</b> : Select all lines for a given Requisition if the entire Requisition needs to be returned.							
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								Clean and Inspect Hull Transducer for USCGC											~

Step	Action
3.	Click the <b>Return</b> button.
	Select Requests: Add Return Workload Assignment

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JCG =	11503CC210000039,0001			Boat Crew Survival Vest (Orange) Contains five (5) pockets sized to fit the equipment requirements specified in the USCG Rescue & Survival Systems Manual. See "Note to Supplier" for complete details.	30	Each	100	USD	18-Feb- 2021 00:00:00		LIFESAVING SYSTEMS CORPORATION, 050845460		
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Step	Action
4.	The <b>Return Requisition Lines</b> page displays and a warning message displays at the top of the page. Click in the <b>Reason</b> field. <b>Return Requisition Lines</b>
	* Indicates required field
	* Reason
5.	Enter the reason for the return in the <b>Reason</b> field.
	Return Requisition Lines
	* Indicates required field
	* Reason
6.	Click the <b>Apply</b> button.
	Cancel Apply

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Step	Action
7.	The <b>Demand Workbench</b> page redisplays with a <b>Confirmation</b> message at the top of the page. <b>Note</b> : The Requester receives a Workflow Notification indicating that the Requisition Line has been returned. The status of the Requisition Line is updated to "Returned" but the Requisition is still considered approved (funding is still committed). Any changes made by the Requester will need to be made with an Amendment.
8.	End of Procedure.



#### Lesson 3: Workload Assignments

Requisitions are created within the CLM iProcurement application. Once a Requisition is approved, the associated Requisition Lines can then be assigned to a Buyer for use with a Miscellaneous Obligation action. Requisition Lines are assigned to Buyers through the Workload Assignment capability, which is accessed through the Buyer Work Center. Users with the CLIENT CLM Purchasing Contracting Professional responsibility create Workload Assignments for pre-Award activities, post-Award activities, and Award administration activities. They then assign the Workload Assignment(s) to other users to track the completion of procurement action tasks.

#### 3.1 Searching for Workload Assignments

This lesson demonstrates the steps for performing a search for Workload Assignments based on specific search criteria.

Workload Managers with the CLIENT CLM Purchasing Contracting Professional responsibility perform this process. Users with the CLIENT Miscellaneous Obligation Preparer or CLIENT Miscellaneous Approver responsibilities can also perform this process.

**Objective**: In this lesson, the CLM user will learn the steps required to search for a Workload Assignment.

**Scenario**: You are a CLM user responsible for managing Workload Assignments. For this scenario, perform a search for Workload Assignments assigned to a specific Buyer.

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	460	Purchase Requisition	Assigned	19- Dec- 2019	17-Feb-2020		THANNISCH, TIMOTHY G					/	^
	482	Post Award Request	Assigned	27- Dec- 2019	30-Dec-2019		POWELL, JAVOIL M					1	
	16289	Post Award Request	Assigned	27- Dec- 2019	30-Dec-2019		POWELL, JAVOIL M					1	
	RWRC-20-0010	Purchase Requisition	Assigned	19- Feb- 2020	07-May-2020		IGWEBUEZE JONATHAN C					0	
	780	Post Award Request	Assigned	12- Mar- 2020	19-Mar-2020		POWELL, JAVOIL M					1	
	1653	Post Award Request	Assigned	17- Aug- 2020	01-Sep-2020		SIMMONS, BENJAMIN					1	
	11503CC210000003	Purchase Requisition	Assigned	18- Dec- 2020	17-Jan-2021		CLM2, UCG	1,500.00	USD			0	
	11503CC210000002	Purchase Requisition	Assigned	29- Dec- 2020	18-Jan-2021		CLM2, UCG	1,500.00	USD	70Z02321C10000013	Approved	1	
	1960	Purchase Requisition	Assigned	29- Dec- 2020	04-May-2021		CLM1, UCG	17,500.00	USD			1	
_	1150200210000017	Purchase	Assigned	-80	12 Jan 2021			60.00	LIED				

Step	Action
1.	This lesson begins at the Workload Assignment page.
	Refer to the "Viewing Workload Assignments from the Buyer Work Center" lesson for the detailed steps on how to navigate to this page.
2.	Click the Search button.
	Search

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	460	Purchase Requisition	Assigned	19- Dec- 2019	17-Feb-2020		THANNISCH, TIMOTHY G					/^
	482	Post Award Request	Assigned	27- Dec- 2019	30-Dec-2019		POWELL, JAVOIL M					1
	16289	Post Award Request	Assigned	27- Dec- 2019	30-Dec-2019		POWELL, JAVOIL M					1
	RWRC-20-0010	Purchase Requisition	Assigned	19- Feb- 2020	07-May-2020		IGWEBUEZE, JONATHAN C					/
	780	Post Award Request	Assigned	12- Mar- 2020	19-Mar-2020		POWELL, JAVOIL M					/
	1653	Post Award Request	Assigned	17- Aug- 2020	01-Sep-2020		SIMMONS, BENJAMIN					1

Step	Action
3.	The <b>Search</b> section displays. Users can perform searches using any of the search criteria provided or add another search criteria field as needed. Enter or select at least one search criteria.
	This lesson demonstrates the steps used to perform a search for all Workload Assignments assigned to a specific Buyer.
4.	Click in the <b>Buyer</b> field.
	Buyer is
5.	Enter the applicable information into the <b>Buyer</b> field or use the <b>Search and</b>
	<b>Select</b> icon to search for and select the applicable Buyer.
	Buyer is 🗸

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iyer	Workload Assignm	ient Summary										
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	Assignment No 460	Assignment Type Purchase Requisition	Status Assigned	Start Date 19- Dec- 2019	Estimated Completion Date 17-Feb-2020	Actual Completion Date	Buyer Thannisch, Timothy G	Assignment Total	Assignment Currency	Award Number	Award Status	Act
	Assignment No 460 482	Assignment Type Purchase Requisition Post Award Request	Status Assigned Assigned	Start Date 19- Dec- 2019 27- Dec- 2019	Estimated Completion Date 17-Feb-2020 30-Dec-2019	Actual Completion Date	Buyer THANNISCH, TIMOTHY G POWELL, JAVOIL M	Assignment Total	Assignment Currency	Award Number	Award Status	Act
	Assignment No 460 482 16289	Assignment Type Purchase Requisition Post Award Request Post Award Request	Status Assigned Assigned Assigned	Start Date 19- Dec- 2019 27- Dec- 2019 27- Dec- 2019	Estimated Completion Date 17-Feb-2020 30-Dec-2019 30-Dec-2019	Actual Completion Date	Buyer THANNISCH, TIMOTHY G POWELL, JAVOIL M POWELL, JAVOIL M	Assignment Total	Assignment Currency	Award Number	Award Status	Act
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Step	Action			
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Step	Action
7.	The search results display.
	Users can access the Workload Assignment two different ways depending on the status of the Assignment:
	<ul> <li>Click on the Assignment Number link to view the Workload Assignment details in read-only mode</li> </ul>
	<ul> <li>Click the Update icon (pencil icon in the Actions column) to access the Workload Assignment details directly in edit mode.</li> </ul>
8.	End of Procedure.



#### 3.2 Completing Workload Assignments

This lesson demonstrates the steps for manually completing a Workload Assignment. Information pertaining to how Workload Assignments are automatically completed by the system is also provided. Once completed, Workload Assignments <u>cannot</u> be re-opened.

Buyers with the CLIENT Miscellaneous Obligation Preparer responsibility perform this process.

**Objective**: In this lesson, the Miscellaneous Obligations user will learn the steps required to complete a Workload Assignment.

**Scenario**: You are a Miscellaneous Obligations user responsible for processing procurement requests in response to Workload Assignments. The procurement actions associated with your Workload Assignment are not complete, but you wish to close the Workload Assignment. For this scenario, you will manually complete the Workload Assignment.
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	11503PR21000006	Purchase Requisition	Assigned	22- Apr- 2021	15-Jun-2021		MISCOBS, UCG					1

Step	Action
1.	This lesson begins at the <b>Workload Assignment</b> page with the "My Active Assignments" saved search displayed.
	Refer to the "Viewing Workload Assignments from the Buyer Work Center" lesson for the detailed steps on how to navigate to this page.



Step	Action
2.	Completing Workload Assignments:
	Manually Complete a Workload Assignment:
	Once a Workload Assignment is complete, it can be completed manually. Manual completion of the Workload Assignment can take place regardless if all of the Milestones (system or user-defined) are complete.
	Automatically Complete Workload Assignments:
	Workload Assignments can be completed automatically by the system once all Milestones within the Workload Assignment are complete. When each Milestone has an actual completion, date defined and the "Compute Milestones Completion Date for Assignment" request is run, the system will automatically update the status of the Workload Assignment to "Completed". Users do not run this process. This concurrent request is scheduled to run automatically at a frequency defined in the Agency's operating procedures. Once the Workload Assignment is automatically completed, it cannot be reopened.
	This lesson demonstrates the steps for manually completing a Workload Assignment.
3.	Click the <b>Update</b> (pencil icon in the <b>Actions</b> column) icon for the applicable Workload Assignment.
	Actions

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Step	Action
4.	The Update Workload Assignment page displays.
	Click the Action dropdown button.

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Step	Action
5.	The <b>Action</b> list of values display.
	Click the Manually Complete list item. Cancel Manually Complete Re-assign Suspend
6.	When an <b>Action</b> is performed, the <b>Reason</b> field is required.
	Click in the Reason field.  * Reason
7.	Enter the appropriate information into the <b>Reason</b> field.  * Reason

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Step	Action
8.	Click the <b>Apply</b> button to save and apply this change.
	View Buyer Workload Cancel Apply

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Step	Action
9.	The Workload Assignment page redisplays.
	The completed Workload Assignment is no longer displayed in the <b>Workload Assignments</b> table as an active Assignment.
10.	End of Procedure.