

**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 **illustration purposes only**. Utilize actual data values when performing these functions in the Production environment.

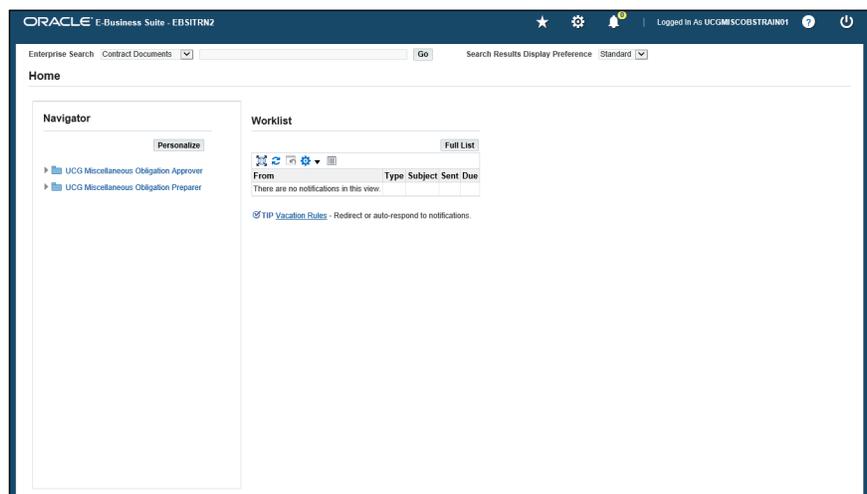
Lesson 1: Establishing User Preferences

1.1 Establishing User Preferences

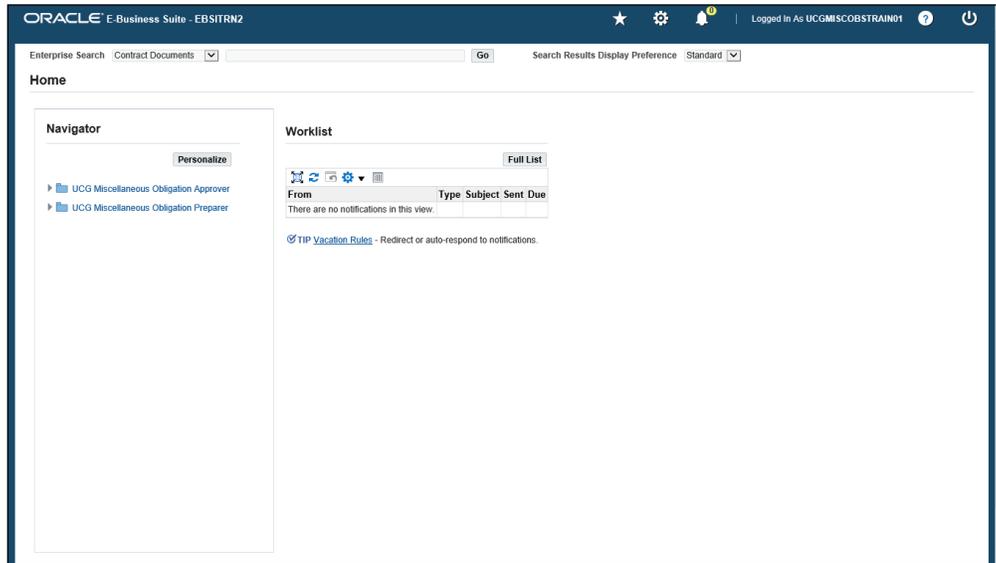
This overview lesson will demonstrate the steps to view and manage your user preferences via the **Settings** icon after navigating to the **Demand Workbench**.

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

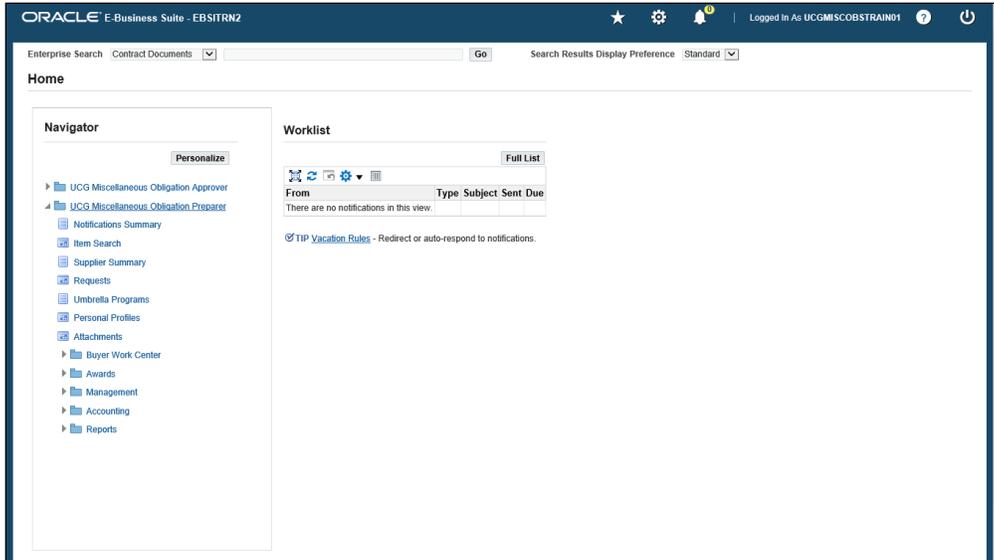
Scenario: You are a Miscellaneous Obligations user within the Organization and want to define your user preferences to minimize future data entry for data elements (Office and Contact defaults) that are consistently the same.



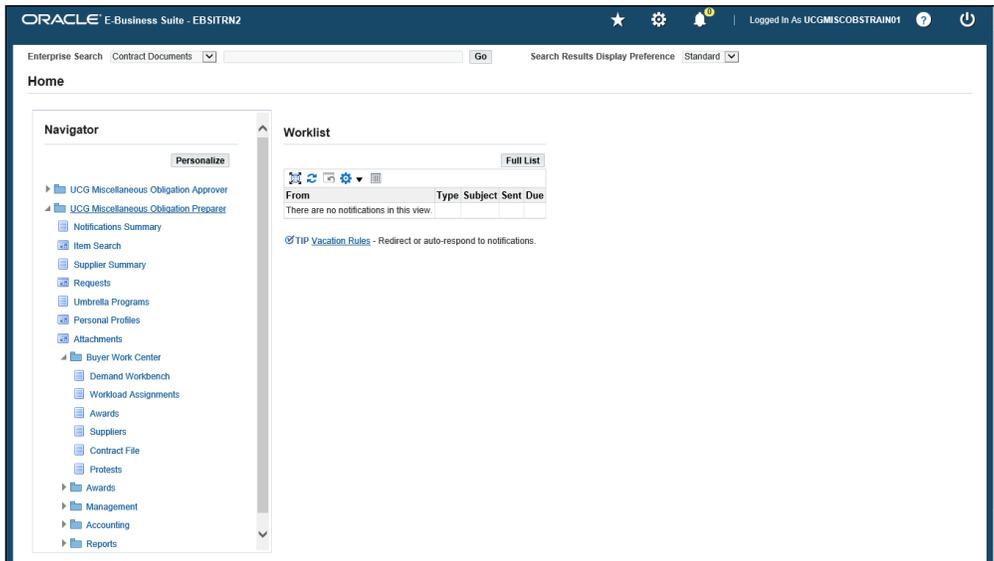
| Step | Action |
|------|---|
| 1. | <p>This lesson begins at the APPLICATION Home Page.</p> <p>Refer to the APPLICATION Navigation Course (Understanding the Oracle Home Page and Accessing the Oracle Financial Applications topic 2.1) for detailed steps on how to navigate to this page.</p> |

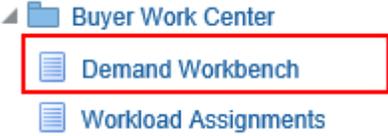


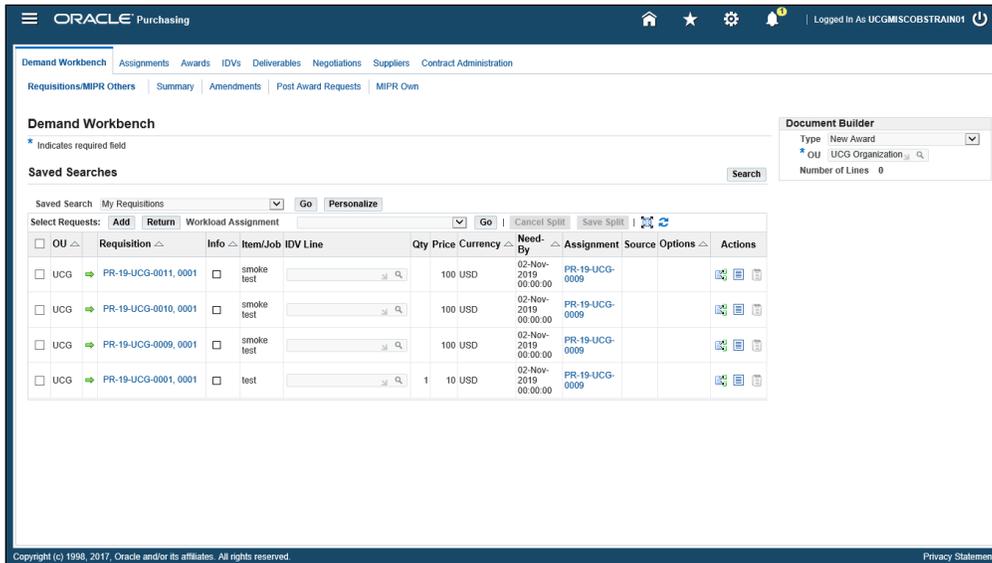
| Step | Action |
|------|--|
| 2. | <p>After logging into the application, the Oracle Home Page displays and the user must select the applicable responsibility.</p> <p>For this scenario, utilize the CLIENT Miscellaneous Obligation Preparer link.</p> <ul style="list-style-type: none"> ▶ UCG Miscellaneous Obligation Approver ▶ UCG Miscellaneous Obligation Preparer |



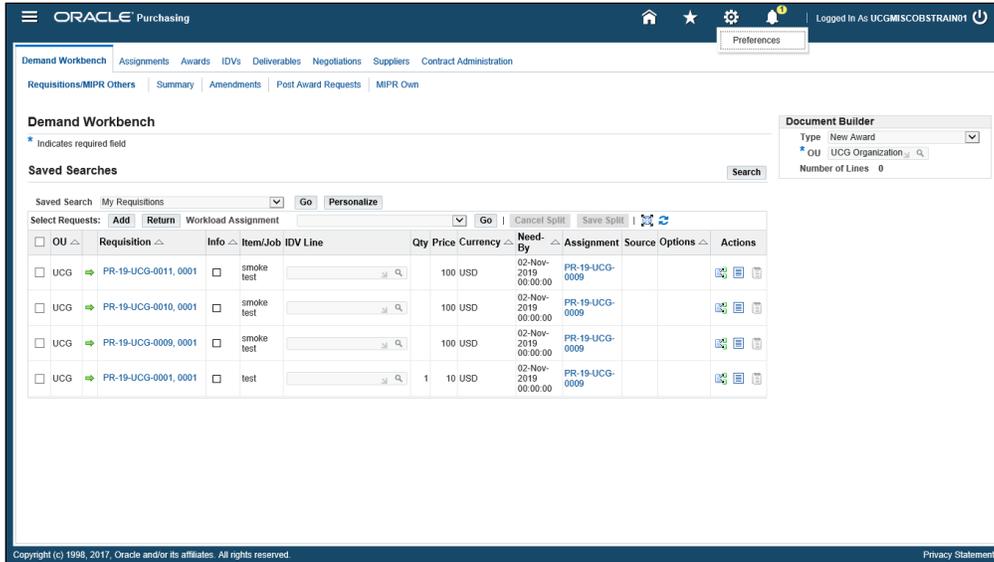
| Step | Action |
|------|--|
| 3. | <p>Click the Buyer Work Center link.</p> <ul style="list-style-type: none">  Attachments  Buyer Work Center  Awards |



| Step | Action |
|------|--|
| 4. | <p>Click the Demand Workbench link.</p>  |

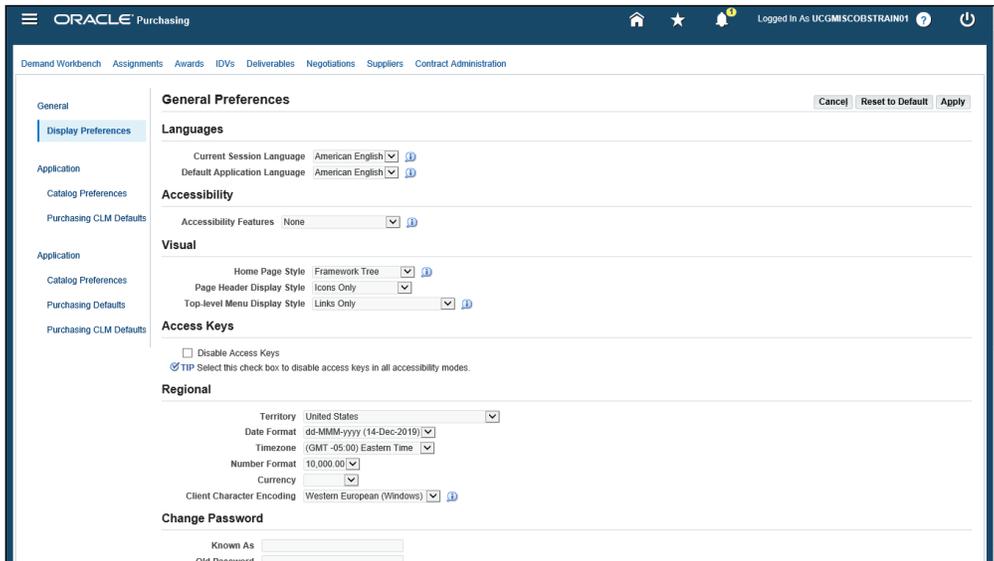


| Step | Action |
|------|---|
| 5. | <p>The Demand Workbench page displays.</p> <p>Use the Settings icon to navigate to Preferences.</p> <p>Click the Settings (Gear) icon.</p>  |



The screenshot shows the Oracle Purchasing Demand Workbench interface. At the top right, there is a 'Preferences' link. Below the main navigation, there is a 'Document Builder' section with a dropdown menu set to 'New Award' and a search field for 'UCG Organization'. The main area contains a table of requisitions with columns for OU, Requisition, Info, Item/Job IDV Line, Qty, Price, Currency, Need-By, Assignment, Source, Options, and Actions. The table lists four requisitions for 'smoke test' and 'test' items.

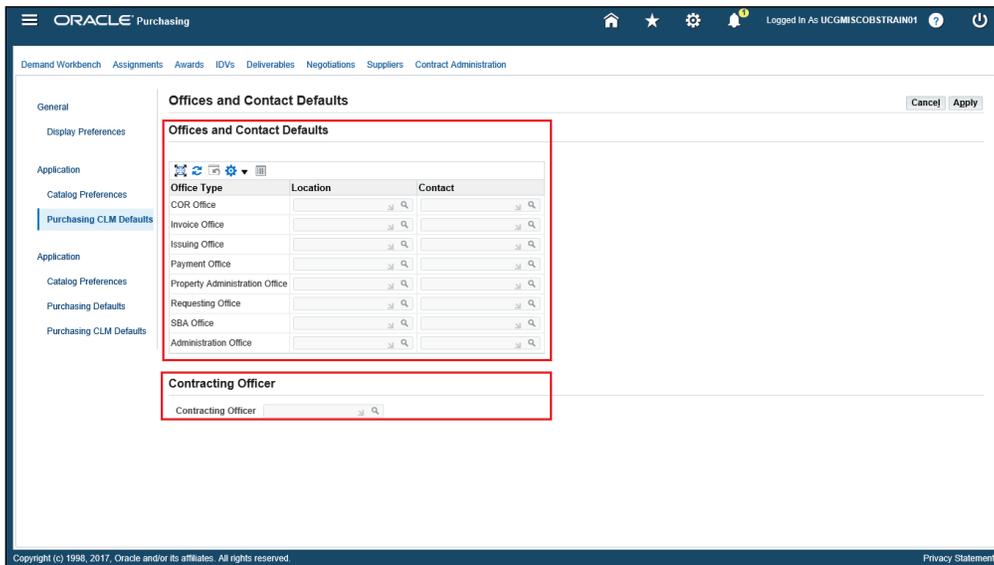
| Step | Action |
|------|------------------------------------|
| 6. | Click the Preferences link. |



The screenshot shows the 'General Preferences' configuration page in Oracle Purchasing. The page is divided into several sections:

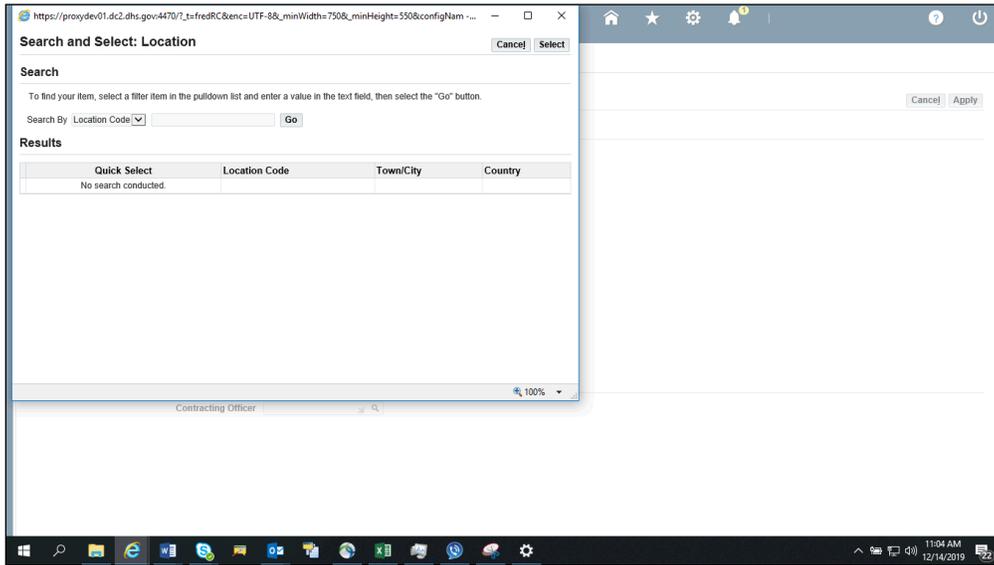
- Languages:** Current Session Language (American English) and Default Application Language (American English).
- Accessibility:** Accessibility Features (None).
- Visual:** Home Page Style (Framework Tree), Page Header Display Style (Icons Only), and Top-level Menu Display Style (Links Only).
- Access Keys:** A checkbox for 'Disable Access Keys' is checked, with a tip: 'Select this check box to disable access keys in all accessibility modes.'
- Regional:** Territory (United States), Date Format (dd-MMM-yyyy (14-Dec-2019)), Timezone (GMT -05:00 Eastern Time), Number Format (10,000.00), Currency, and Client Character Encoding (Western European (Windows)).
- Change Password:** Fields for 'Known As' and 'Old Password'.

| Step | Action |
|------|--|
| 7. | <p>The General Preferences page displays.</p> <p>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.</p> |
| 8. | <p>For this scenario, use the Purchasing CLM Defaults feature to update user preferences.</p> <p>Click the Purchasing CLM Defaults link.</p>  |

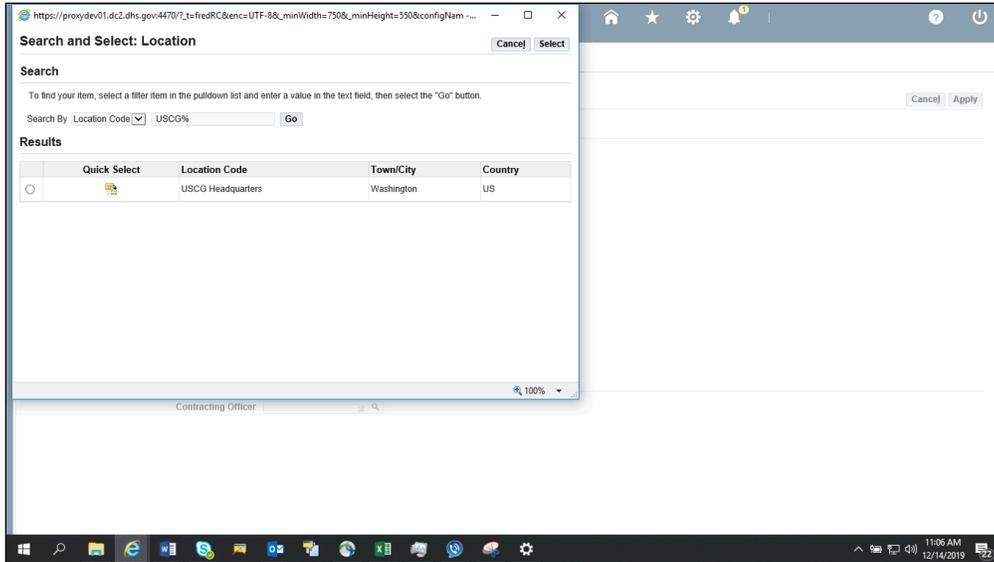


| Step | Action |
|------|--|
| 9. | <p>The Offices and Contact Defaults page displays.</p> <p>The Page consists of:</p> <ul style="list-style-type: none"> ○ Offices and Contract Defaults: Use this section to enter the commonly used office locations and contact information when creating documents. ○ Contracting Officer: Use this field to enter the commonly used Contracting Officer when creating documents. |

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

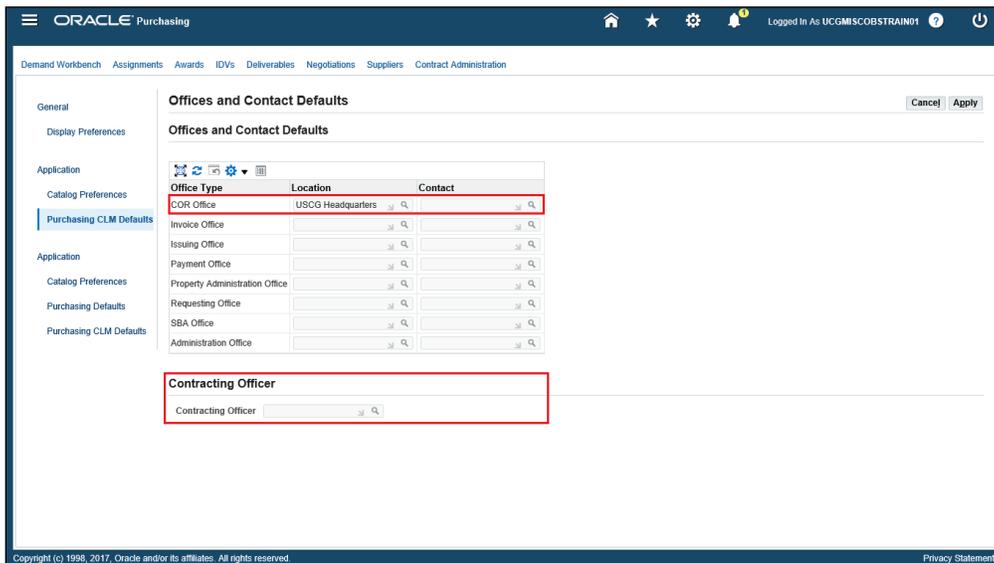


| Step | Action |
|------|---|
| 11. | The Search and Select: Location page displays in a new window. Use the Search By field to search for the COR Office . Click in the Search By field.  |
| 12. | Enter the desired information into the Search By field.  |
| 13. | Click the Go button to initiate the search.  |

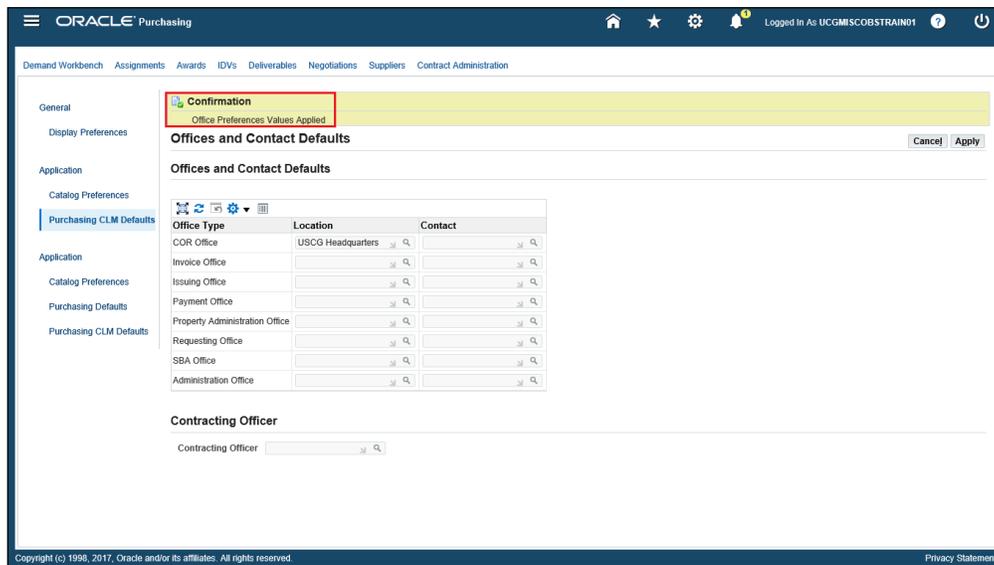


| Step | Action |
|------|---|
| 14. | The search results display, and the user must select the applicable Location. |
| 15. | Use the Quick Select icon for the CLIENT location to populate the Location field. |

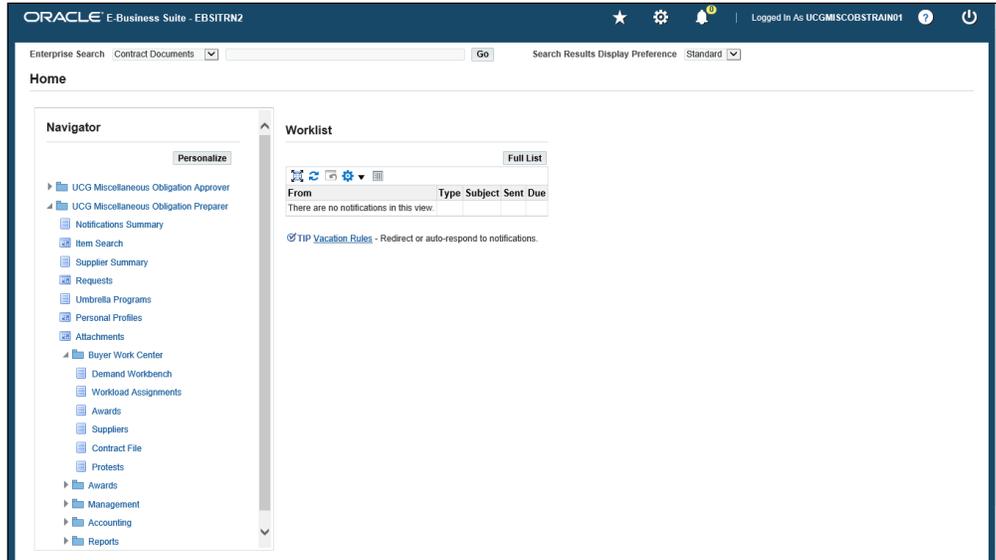
| | | |
|---|---|-------------------|
| ○ |  | USCG Headquarters |
|---|---|-------------------|



| Step | Action |
|------|--|
| 16. | The Offices and Contact Defaults section redisplay 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.  |



| 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 .  |



| Step | Action |
|------|---|
| 20. | The APPLICATION Home Page redisplay. |
| 21. | End of Procedure. |

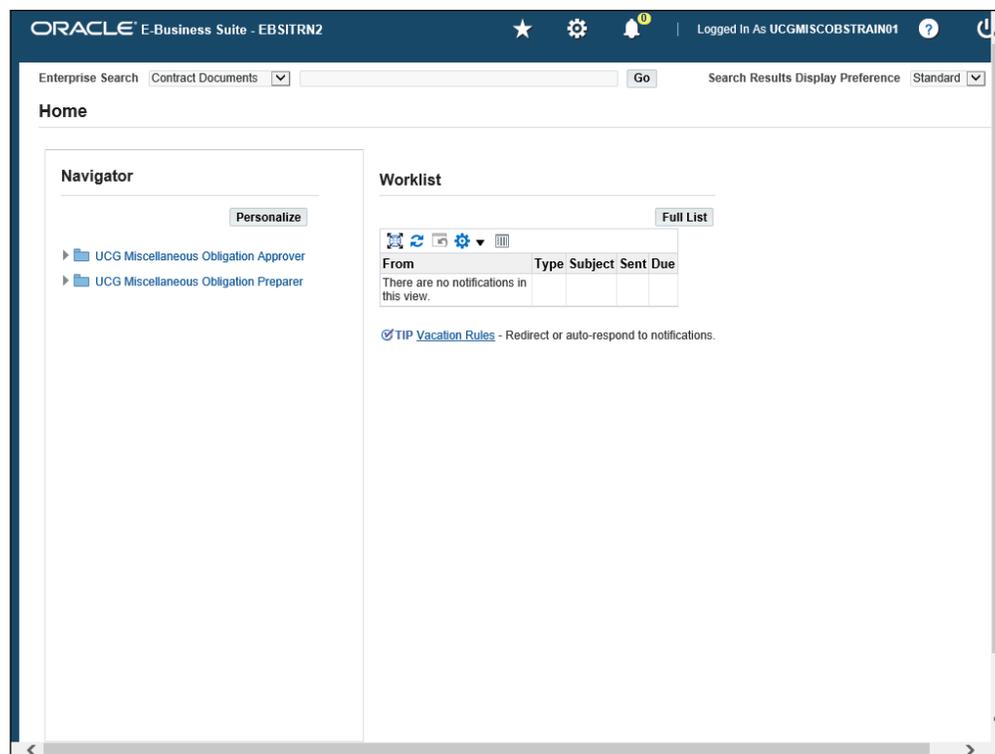
1.2 Creating Vacation Rules

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.

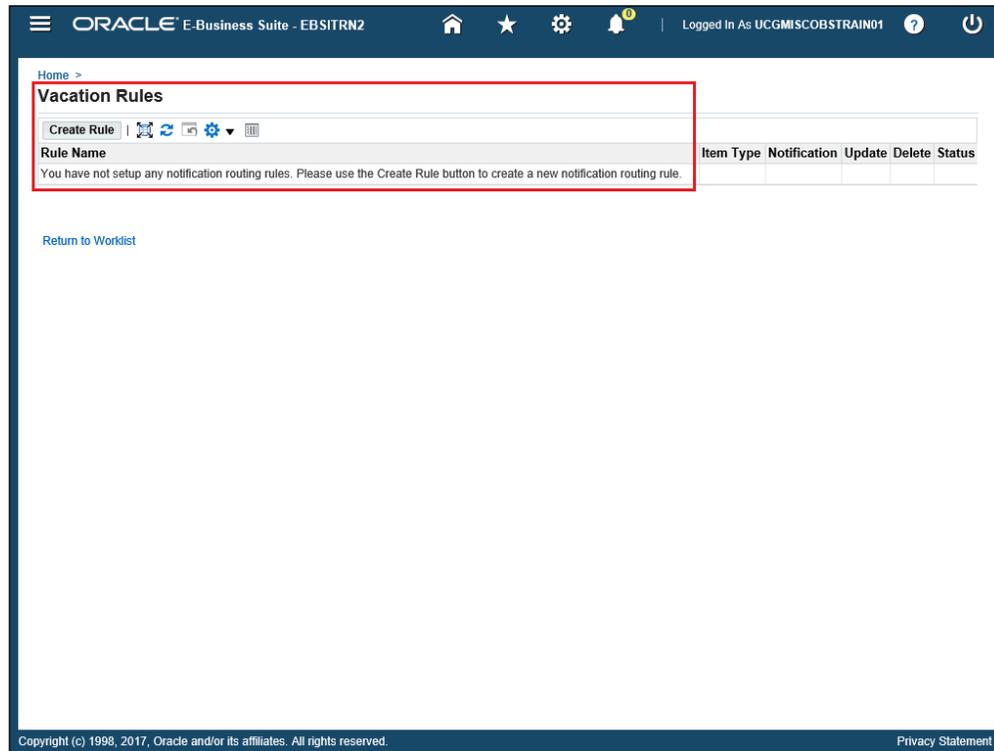
In this lesson, the steps to create and manage a vacation rule are demonstrated.

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.

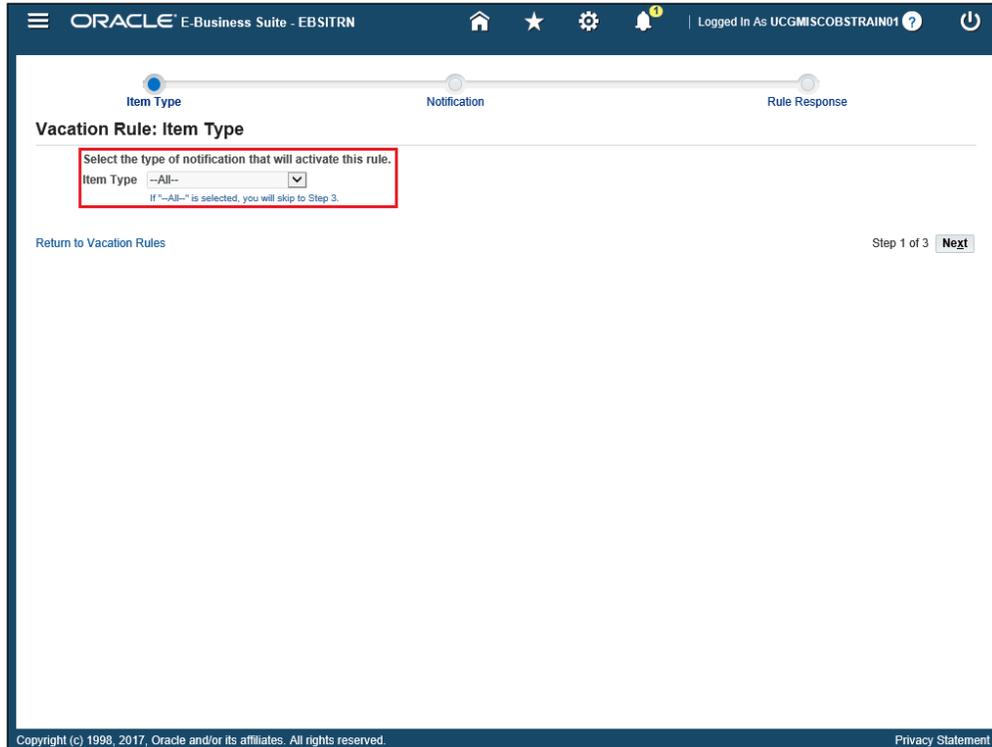


| Step | Action |
|------|--|
| 1. | <p>This lesson begins at the Oracle Home Page.</p> <p>Refer to the APPLICATION Navigation Course (Understanding the Oracle Home page and Accessing the Oracle Financial Applications topic 2.1) for detailed steps on how to navigate to this page.</p> |
| 2. | <p>After logging into the application, the Oracle Home Page displays, use the Vacation Rules link to access the Vacation Rules page.</p> <p>Click the Vacation Rules link.</p> <p> Vacation Rules Redirect or auto-respond to notifications.</p> |



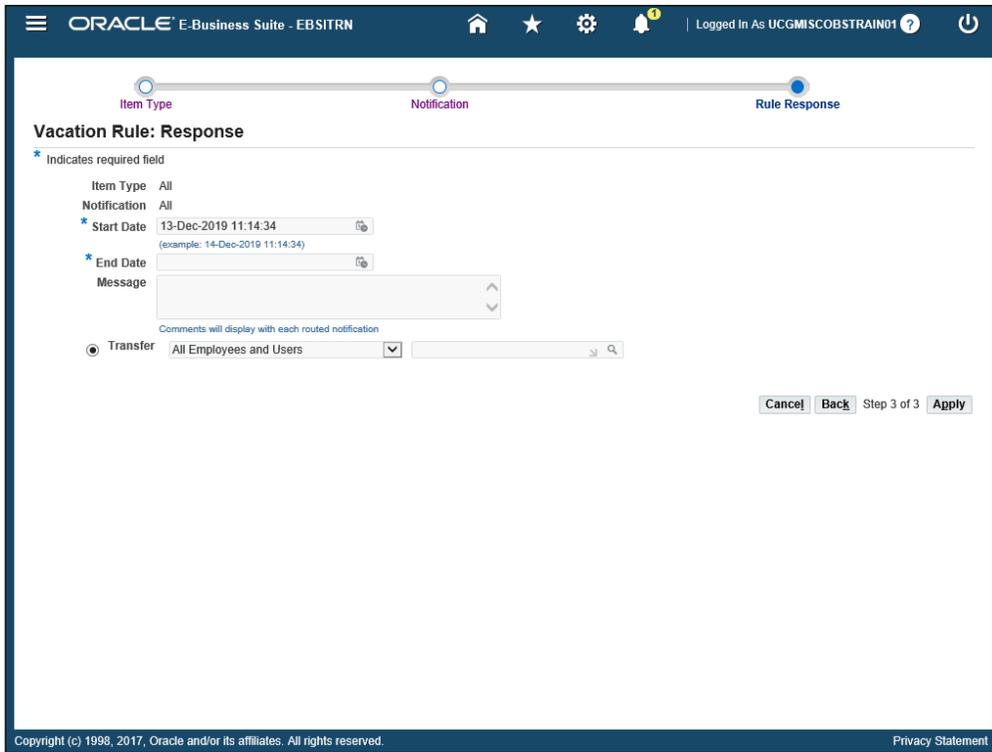
| Step | Action |
|------|---|
| 3. | <p>The Vacation Rules page displays.</p> <p>Any previously created vacation rules will display. For this scenario, no rules have been setup.</p> |

| Step | Action |
|------|---|
| 4. | Click the Create Rule button.  |



| Step | Action |
|------|--|
| 5. | <p>The Vacation Rule: Item Type page displays. This is step 1 of the set-up wizard.</p> <p>Use this page to identify the type of Notifications to reassign.</p> <p>The Item Type field defaults to "All". Based on the user's responsibilities, there may be other options available for selection.</p> <p>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.</p> <p>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 notification format that will activate the rule when the user clicks the Next button.</p> |

| Step | Action |
|------|--|
| 6. | <p>For this scenario, the default selection of "All" will be utilized.</p> <p>Click the Next button.</p> <p>Step 1 of 3 Next</p> |



ORACLE E-Business Suite - EBSITRN | Logged In As UCGMISCOBSTRAN01

Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 13-Dec-2019 11:14:34
(example: 14-Dec-2019 11:14:34)

* End Date

Message

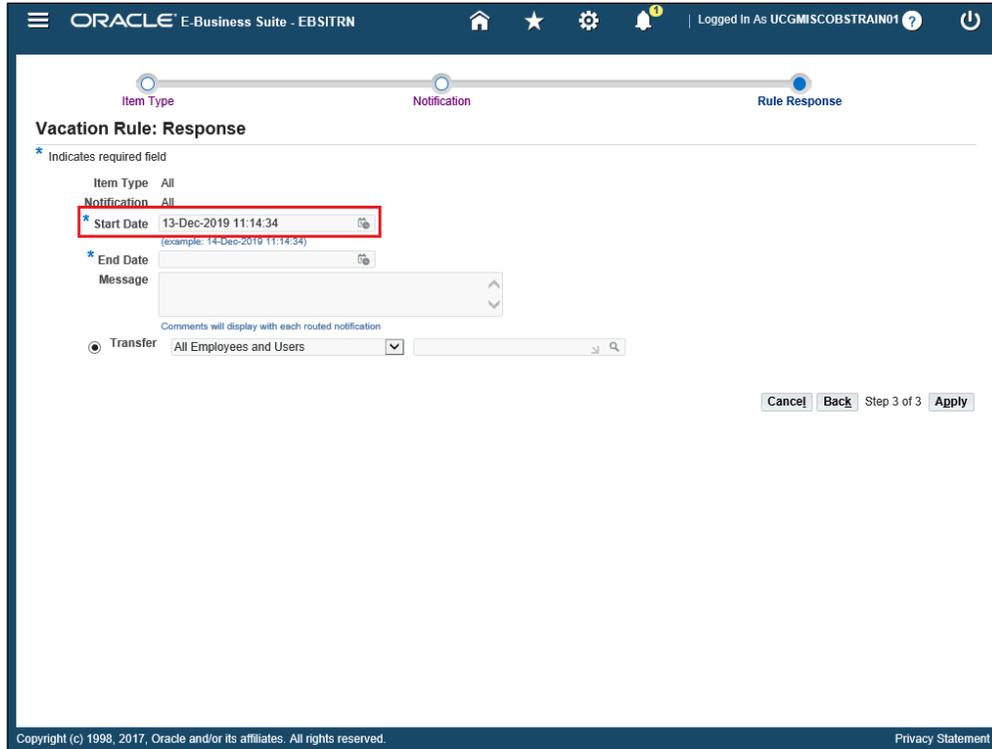
Comments will display with each routed notification

Transfer All Employees and Users

Cancel Back Step 3 of 3 Apply

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| Step | Action |
|------|---|
| 7. | <p>The Vacation Rule: Response page displays. This is step 3 of the set-up wizard.</p> <p>Use this page to:</p> <ul style="list-style-type: none"> ○ Define the start and end date for the vacation rule period ○ Identify the user to whom the Notifications will be transferred to |



ORACLE E-Business Suite - EBSITRN | Logged In As UCGMISCOBSTRAN01

Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 13-Dec-2019 11:14:34 

(example: 14-Dec-2019 11:14:34)

* End Date 

Message

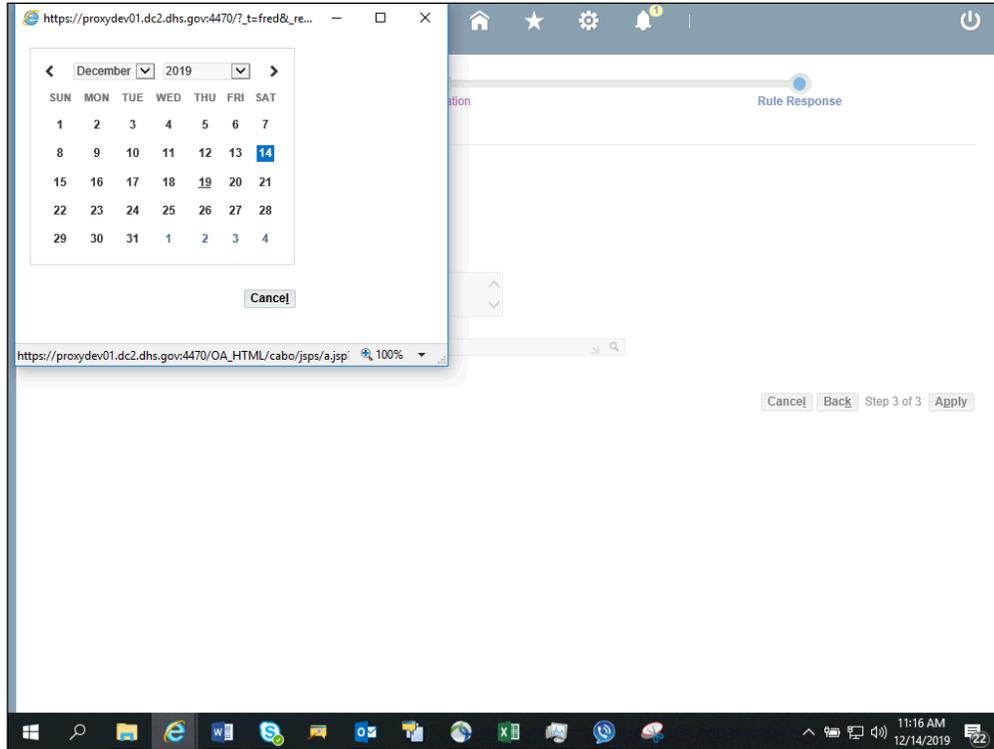
Comments will display with each routed notification

Transfer All Employees and Users 

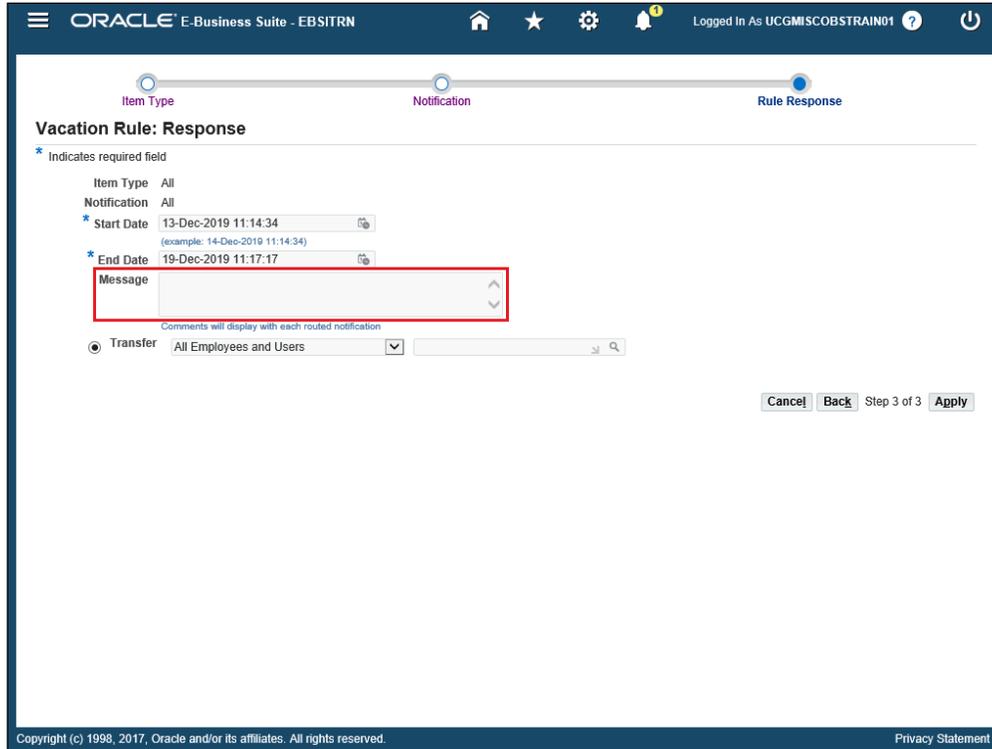
Cancel Back Step 3 of 3 Apply

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| 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 <input type="text"/>  |



| 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 Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 13-Dec-2019 11:14:34
(example: 14-Dec-2019 11:14:34)

* End Date 19-Dec-2019 11:17:17

Message

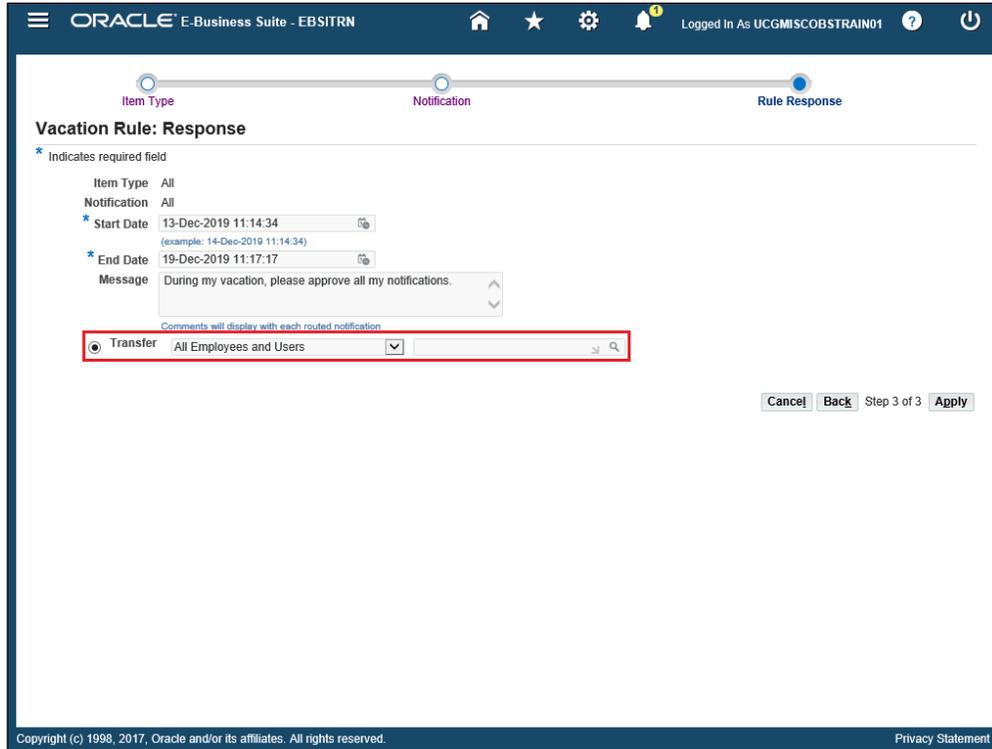
Comments will display with each routed notification

Transfer All Employees and Users

Cancel Back Step 3 of 3 Apply

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| Step | Action |
|------|---|
| 11. | The Vacation Rule: Response page redisplay 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 Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 13-Dec-2019 11:14:34
(example: 14-Dec-2019 11:14:34)

* End Date 19-Dec-2019 11:17:17

Message During my vacation, please approve all my notifications.

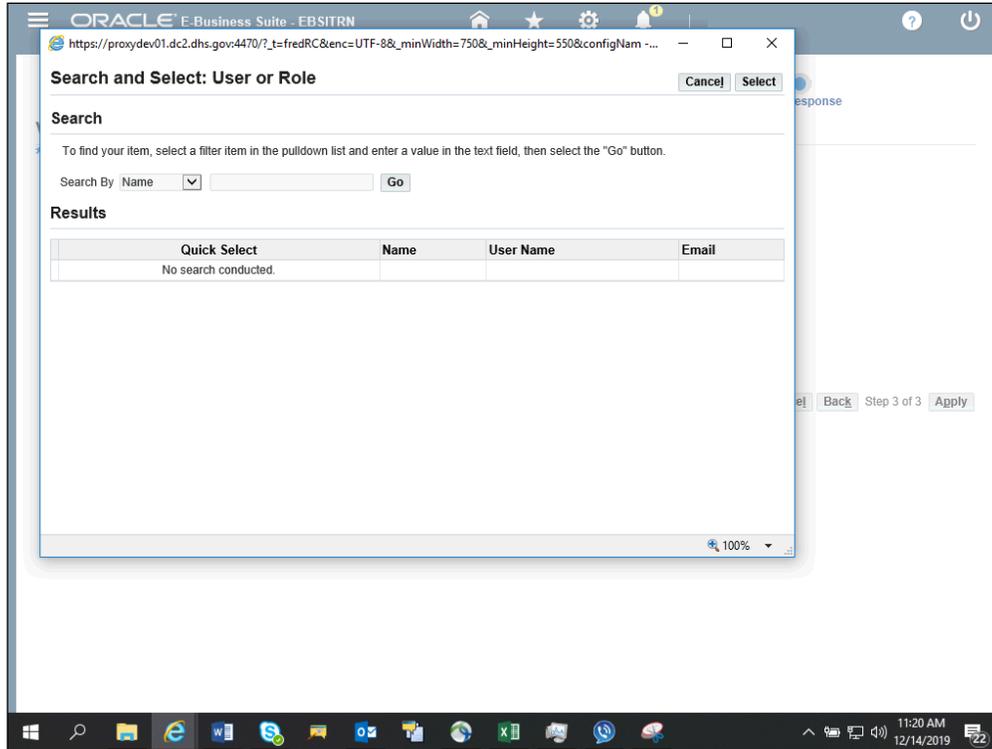
Comments will display with each routed notification

Transfer All Employees and Users

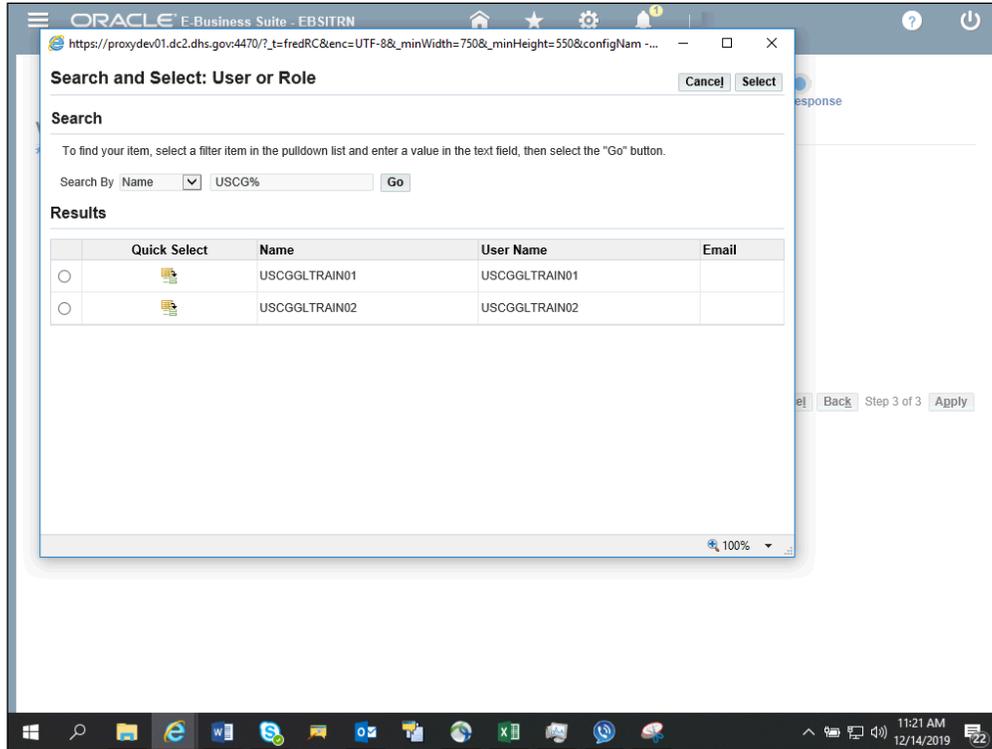
Cancel Back Step 3 of 3 Apply

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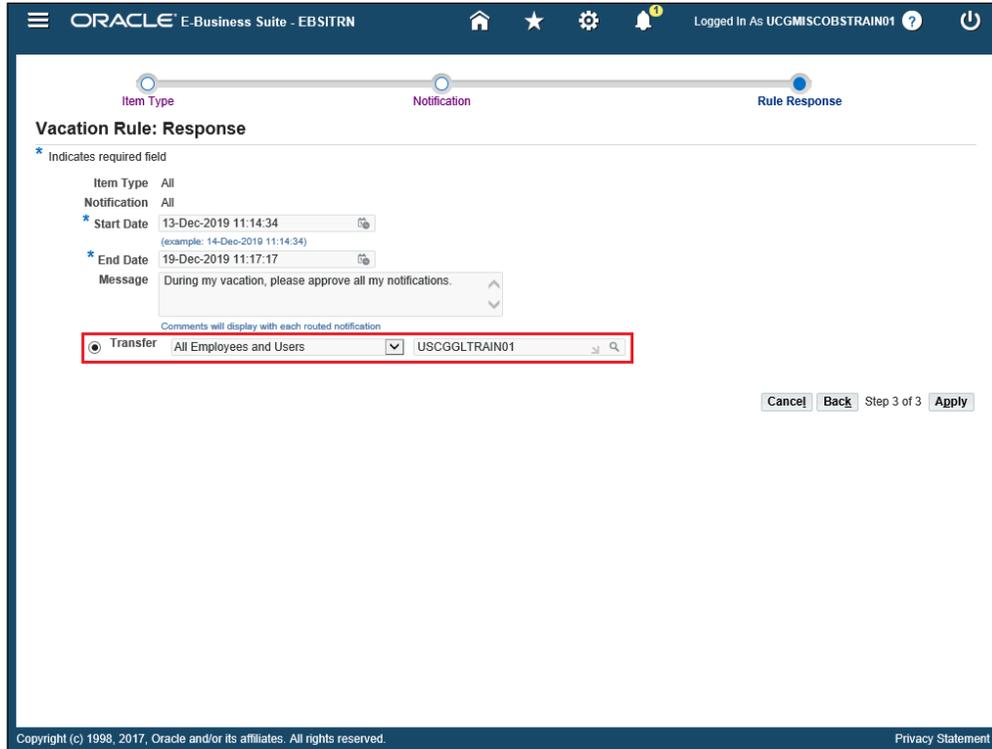
| Step | Action |
|------|--|
| 13. | The Transfer field defaults to All Employees and Users . This selection gives the selected user complete ownership of specified notifications while the vacation rule is active. |
| 14. | Next, identify the individual to whom the notifications will be transferred to. Click the Transfer Search and Select (magnifying glass) icon. <input checked="" type="radio"/> Transfer All Employees and Users |



| Step | Action |
|------|--|
| 15. | <p>The Search and Select: User or Role page displays in a new window.</p> <p>Click in the Search By field.</p> <p>Search By <input type="text" value="Name"/> <input type="text"/> <input type="button" value="Go"/></p> |
| 16. | <p>Enter the appropriate information into the Search By field.</p> <p>Search By <input type="text" value="Name"/> <input type="text"/> <input type="button" value="Go"/></p> |
| 17. | <p>Click the Go button to initiate the search.</p> <p>Search By <input type="text" value="Name"/> <input type="text" value="USCG%"/> <input type="button" value="Go"/></p> |



| Step | Action | | | | |
|---|---|--------------|------|---|---------------|
| 18. | <p>The search results display.</p> <p>Use the Quick Select icon to select the user that the notifications will be transferred to.</p> <table border="1" data-bbox="315 1199 1127 1310"> <thead> <tr> <th data-bbox="315 1199 672 1247">Quick Select</th> <th data-bbox="672 1199 1127 1247">Name</th> </tr> </thead> <tbody> <tr> <td data-bbox="315 1247 672 1310">  </td> <td data-bbox="672 1247 1127 1310">USCGGLTRAIN01</td> </tr> </tbody> </table> | Quick Select | Name |  | USCGGLTRAIN01 |
| Quick Select | Name | | | | |
|  | USCGGLTRAIN01 | | | | |



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Item Type Notification Rule Response

Vacation Rule: Response

* Indicates required field

Item Type All

Notification All

* Start Date 13-Dec-2019 11:14:34
(example: 14-Dec-2019 11:14:34)

* End Date 19-Dec-2019 11:17:17

Message During my vacation, please approve all my notifications.

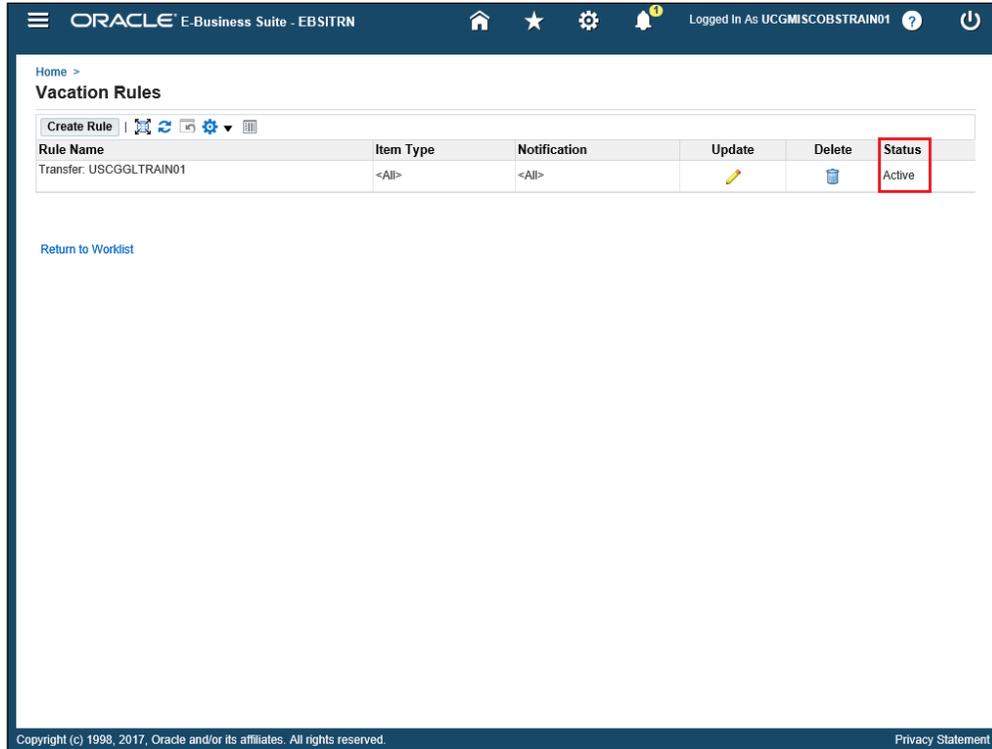
Comments will display with each routed notification

Transfer All Employees and Users | USCGLTRAIN01

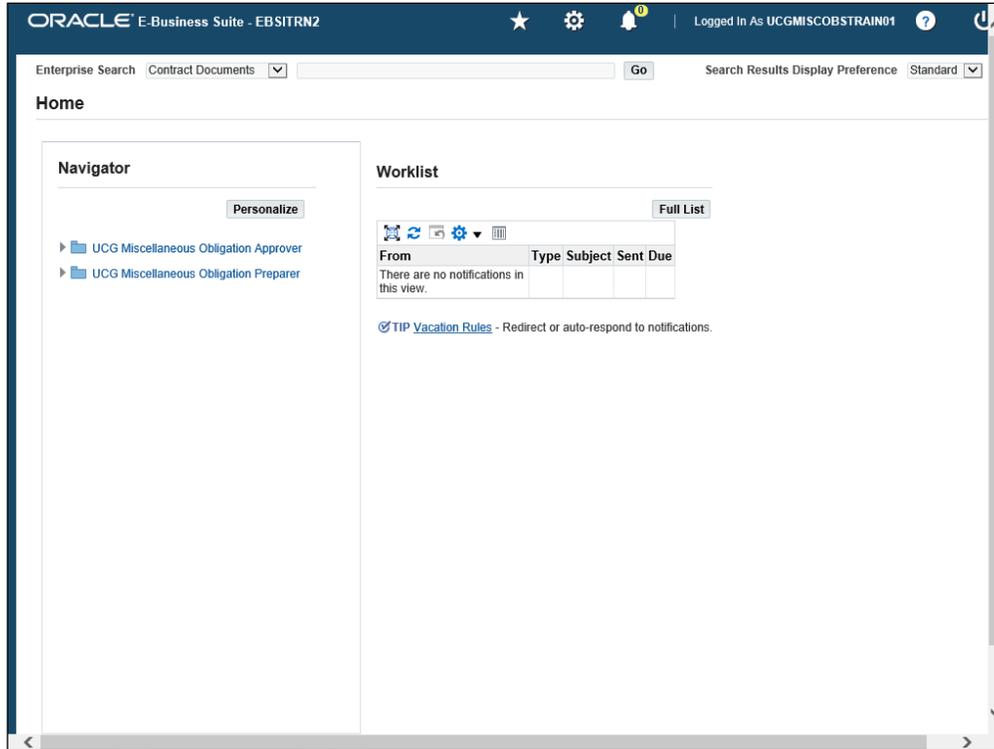
Cancel Back Step 3 of 3 Apply

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| Step | Action |
|------|--|
| 19. | The Vacation Rule: Response page redisplay with the user. |
| 20. | Click the Apply button to and apply the vacation rule.  |



| Step | Action |
|------|--|
| 21. | The Vacation Rules page redisplay 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 .  |



| Step | Action |
|------|--|
| 23. | The Oracle Home Page redisplay. |
| 24. | End of Procedure. |

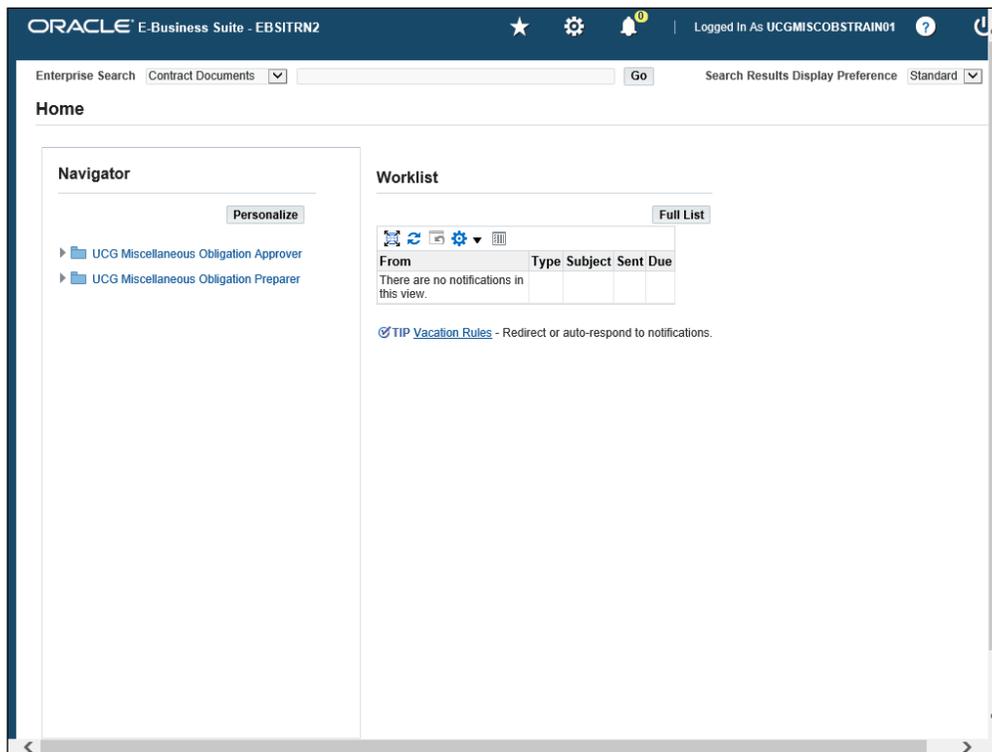
1.3 Deleting Vacation Rules

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.

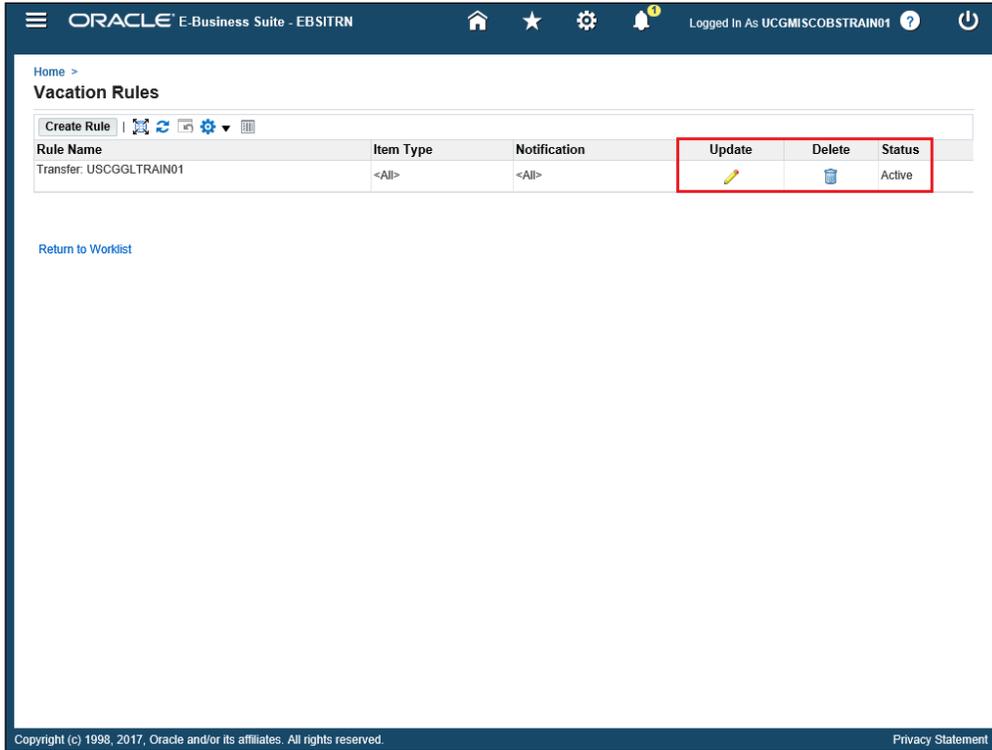
Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to delete vacation rules to remove the ability for another user to act on their behalf after the vacation rule was created.

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



| Step | Action |
|------|--|
| 1. | <p>This lesson begins at the Oracle Home Page.</p> <p>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.</p> |

| Step | Action |
|------|--|
| 2. | <p>After logging into the application, the Oracle Home Page displays, use the Vacation Rules link to access the Vacation Rules page.</p> <p>Click the Vacation Rules link.</p> <p> Vacation Rules - Redirect or auto-respond to notifications.</p> |



ORACLE E-Business Suite - EBSITRN

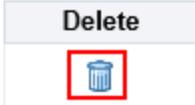
Home > Vacation Rules

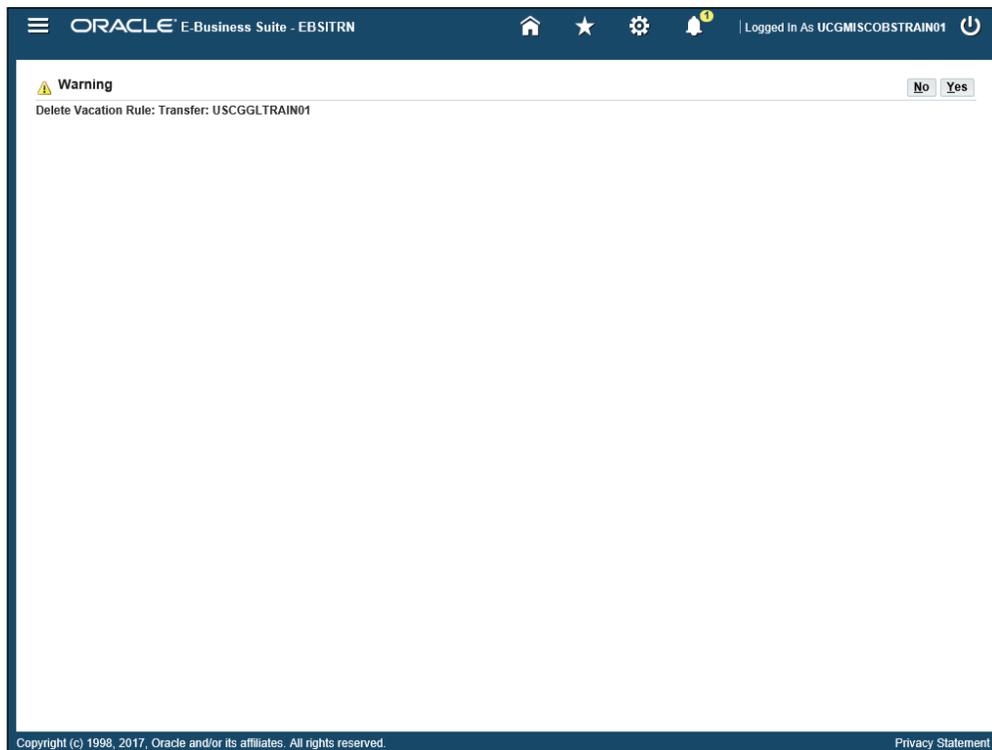
Create Rule | Refresh | Settings | Filter

| Rule Name | Item Type | Notification | Update | Delete | Status |
|-------------------------|-----------|--------------|---|---|--------|
| Transfer: USCGGLTRAIN01 | <All> | <All> |  |  | Active |

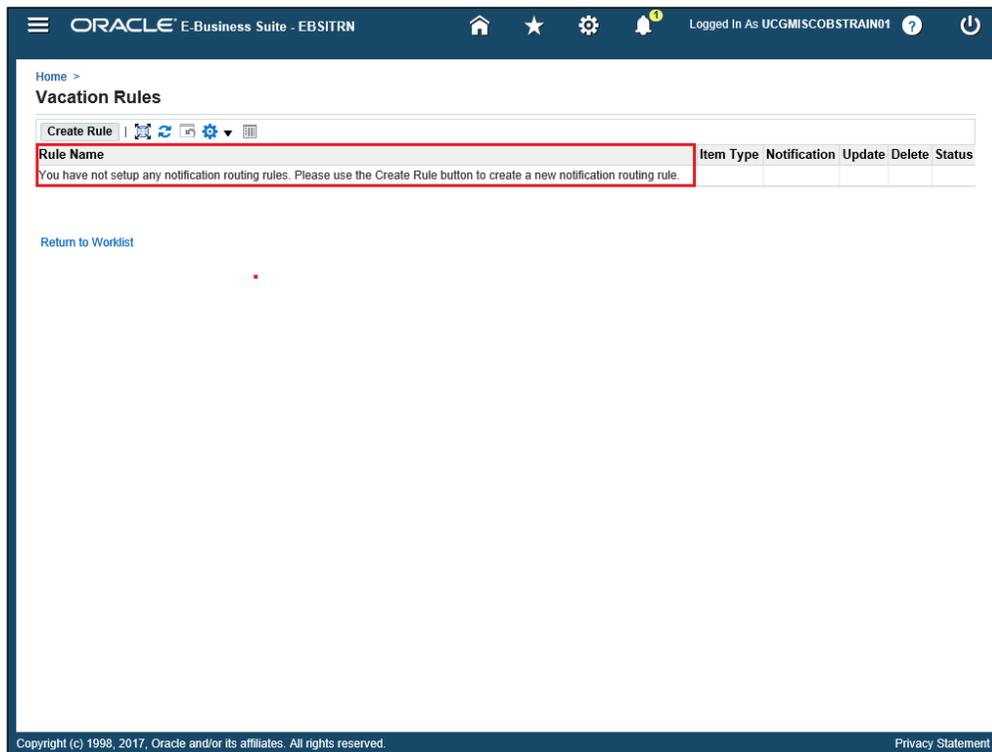
[Return to Worklist](#)

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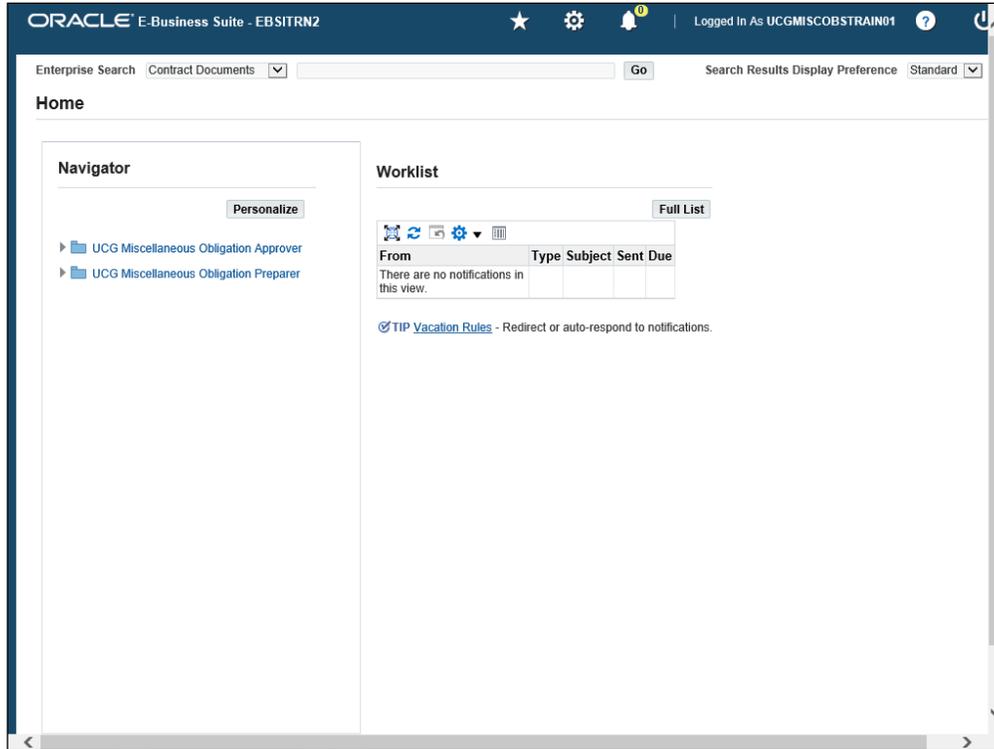
| Step | Action |
|------|--|
| 3. | <p>The Vacation Rules page displays with the vacation rule which currently has a status of "Active".</p> <p>The following actions can be performed on existing vacation rules in either an "Active" or "Inactive" status:</p> <ul style="list-style-type: none"> ○ Update: 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. | <p>Click the Delete icon.</p>  |



| Step | Action |
|------|---|
| 5. | <p>A Warning message displays indicating the vacation rule has been selected for deletion.</p> <p>Click the Yes button.</p>  |



| Step | Action |
|------|---|
| 6. | The Vacation Rules page redisplay, and the vacation rule is removed. |
| 7. | <p>Click the Home icon to return to the Oracle Home Page.</p>  |



| Step | Action |
|------|--|
| 8. | The Oracle Home Page redisplay. |
| 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.

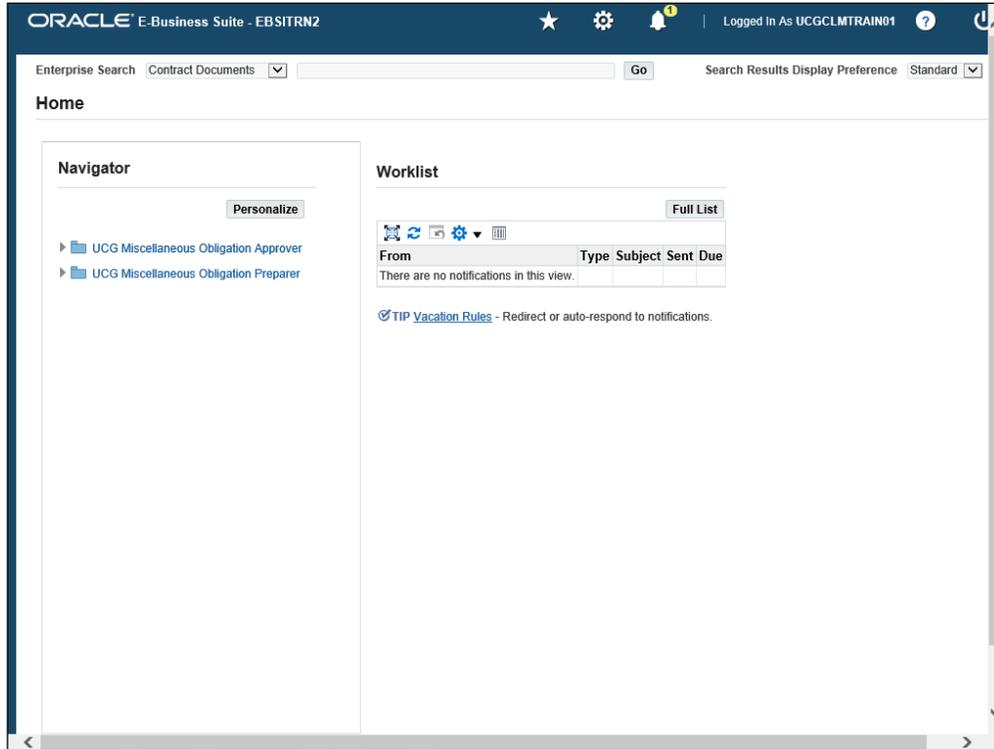
2.2 Using Saved Searches on the Demand Workbench Page

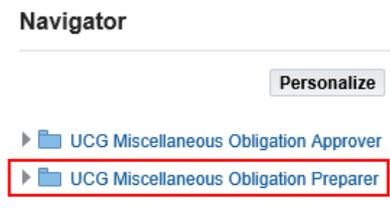
This lesson demonstrates the steps for using the Saved Searches functionality on the **Demand Workbench** page to locate Requisition Lines based on predefined search criteria.

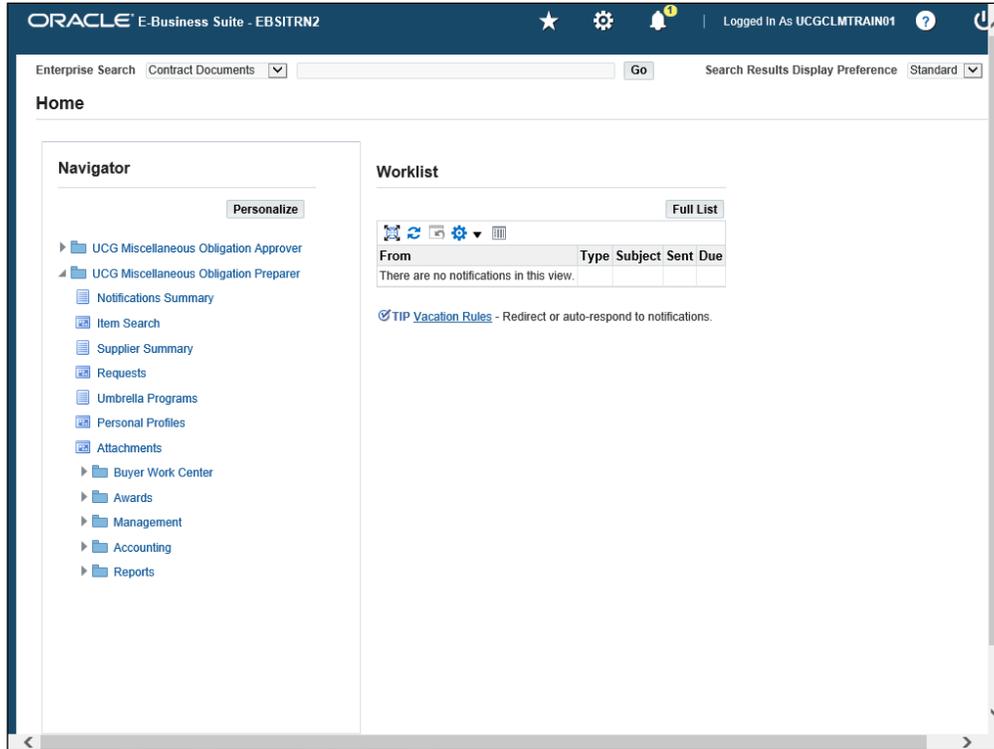
Users with either the CLIENT Miscellaneous Obligations Preparer or CLIENT Miscellaneous Obligations Approver responsibility can perform this process.

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.

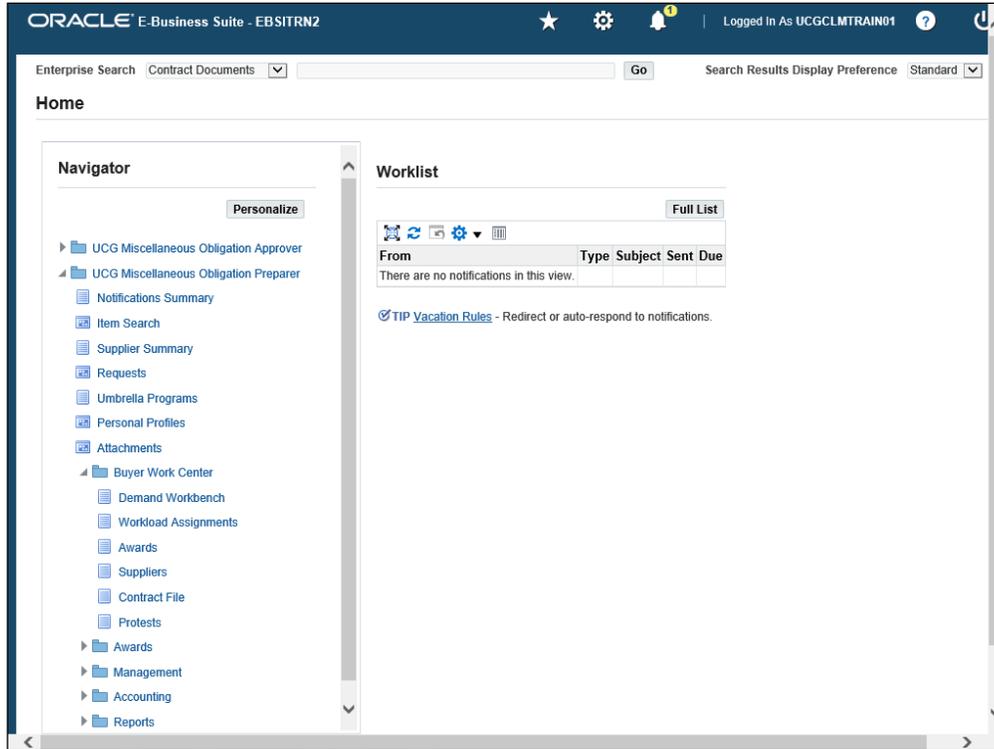
Scenario: You are the Miscellaneous Obligations user responsible for assigning Requisition Lines to Buyers to initiate procurement activities. Using the CLIENT Miscellaneous Obligation Preparer responsibility, you will identify the unassigned Requisition Lines using a saved search.



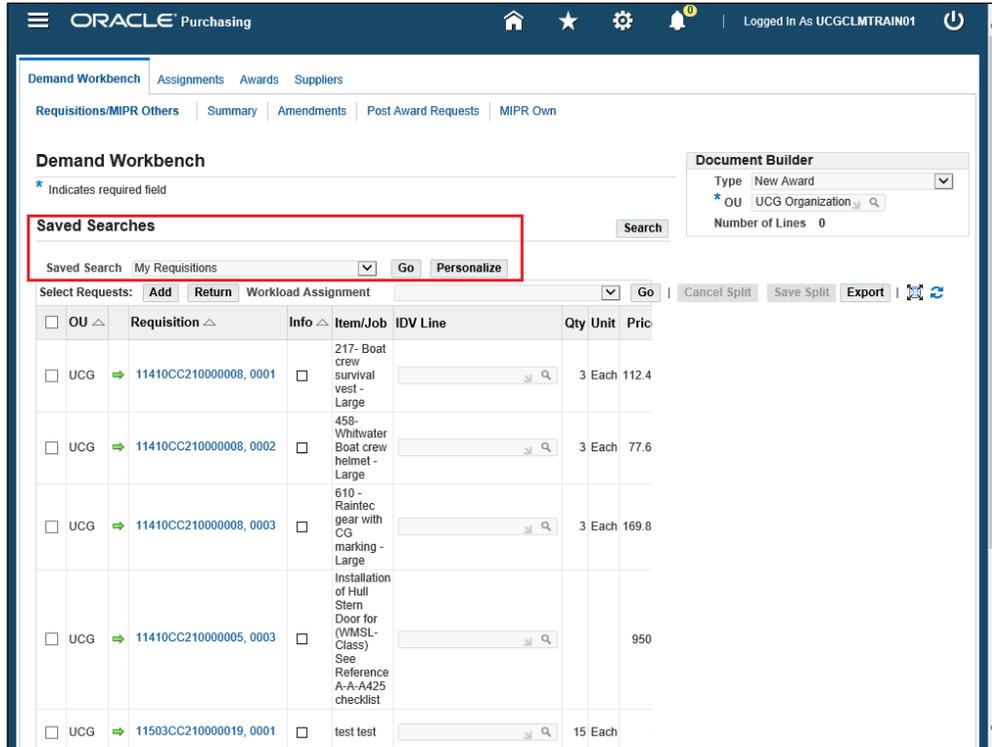
| Step | Action |
|------|--|
| 1. | <p>After logging into the application, the Oracle Home page displays all the responsibilities assigned to the user within the Navigator section.</p> <p>Click the CLIENT Miscellaneous Obligation Preparer responsibility to complete this process.</p>  |



| Step | Action |
|------|--|
| 2. | <p>The functions display.</p> <p>Click the Buyer Work Center link.</p> <ul style="list-style-type: none">  Attachments  Buyer Work Center  Awards |



| Step | Action |
|------|---|
| 3. | <p>The Buyer Work Center functions display.</p> <p>Click the Demand Workbench link.</p> <ul style="list-style-type: none"> ▲ ■ Buyer Work Center <ul style="list-style-type: none"> <li data-bbox="365 1220 641 1262"> ■ Demand Workbench <li data-bbox="365 1272 662 1304"> ■ Workload Assignments |



Demand Workbench

* Indicates required field

Saved Searches Search

Saved Search: My Requisitions Go Personalize

| OU | Requisition | Info | Item/Job | IDV Line | Qty | Unit | Price |
|-----|------------------------|------|---|----------|-----|------|-------|
| UCG | 11410CC210000008, 0001 | | 217- Boat crew survival vest - Large | | 3 | Each | 112.4 |
| UCG | 11410CC210000008, 0002 | | 458- Whitewater Boat crew helmet - Large | | 3 | Each | 77.6 |
| UCG | 11410CC210000008, 0003 | | 610 - Raintec gear with CG marking - Large | | 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 | | 15 | Each | |

| Step | Action |
|------|--|
| 4. | <p>The Demand Workbench page displays with the Requisitions/MIPR Others tab displayed by default.</p> <p>Use the Saved Searches section of the Demand Workbench page to view Requisition Lines based on a saved search.</p> <p>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.</p> |
| 5. | <p>Click the Saved Search dropdown button.</p> <p>Saved Search My Requisitions ▼</p> |

ORACLE Purchasing

Logged In As UCGCLMTRAIN01

Demand Workbench | Assignments | Awards | Suppliers

Requisitions/MIPR Others | Summary | Amendments | Post Award Requests | MIPR Own

Demand Workbench

* Indicates required field

Document Builder

Type: New Award

* OU: UCG Organization

Number of Lines: 0

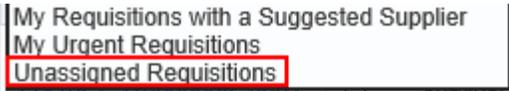
Saved Search

- Issuing Office CG-9124 (70Z023)
- Issuing Office 70Z045
- Issuing Office of CG-9124 (70Z023)
- My Late Requisitions
- My Requisitions
- My Requisitions for Goods
- My Requisitions for Services
- My Requisitions Requiring a Solicitation
- My Requisitions with a New Supplier
- My Requisitions with a Suggested Supplier
- My Urgent Requisitions
- Unassigned Requisitions

Go Personalize

Cancel Split Save Split Export

| IDV Line | Qty | Unit | Price |
|------------------------------|-----|------|-------|
| UCG → 11410CC21000000, 0001 | 3 | Each | 112.4 |
| UCG → 11410CC210000008, 0002 | 3 | Each | 77.6 |
| UCG → 11410CC210000008, 0003 | 3 | Each | 169.8 |
| UCG → 11410CC210000005, 0003 | | | 950 |
| UCG → 11503CC210000019, 0001 | 15 | Each | |

| tep | Action |
|-----|--|
| 6. | <p>The available saved searches display. Use these saved searches to search for Requisition Lines that meet the following criteria:</p> <ul style="list-style-type: none"> ○ 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 <p>Note: Any personalized saved searches that have been created by the user will also display.</p> |
| 7. | <p>To view Requisition Lines eligible for assignment, click the Unassigned Requisitions list item.</p>  |

ORACLE Purchasing | Logged In As UCGCLMTRAIN01

Demand Workbench | Assignments | Awards | Suppliers

Requisitions/MIPR Others | Summary | Amendments | Post Award Requests | MIPR Own

Demand Workbench

* Indicates required field

Document Builder

Type: New Award
 * OU: UCG Organization
 Number of Lines: 0

Saved Searches Search

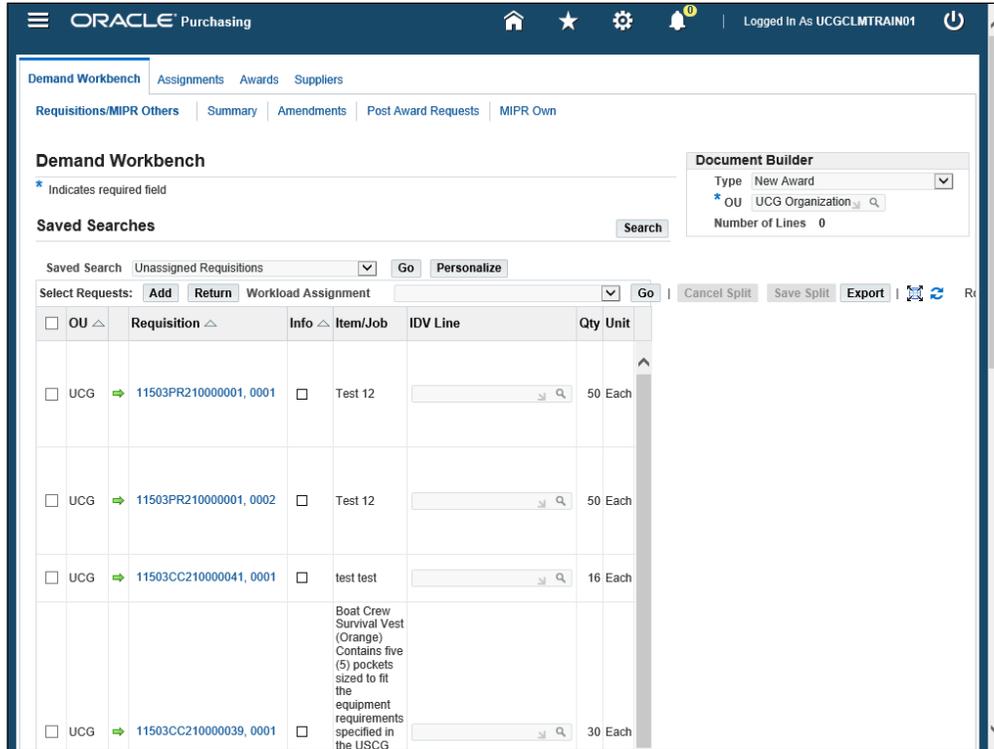
Saved Search: Unassigned Requisitions | Go | Personalize

Select Requests: Add | Return | Workload Assignment | Go | Cancel Split | Save Split | Export

| <input type="checkbox"/> | OU | Requisition | Info | Item/Job | IDV Line | Qty | Unit | Price |
|--------------------------|-----|------------------------|--------------------------|---|----------|-----|------|-------|
| <input type="checkbox"/> | UCG | 11410CC210000008, 0001 | <input type="checkbox"/> | 217- Boat crew survival vest - Large | | 3 | Each | 112.4 |
| <input type="checkbox"/> | UCG | 11410CC210000008, 0002 | <input type="checkbox"/> | 458- Whitewater Boat crew helmet - Large | | 3 | Each | 77.6 |
| <input type="checkbox"/> | UCG | 11410CC210000008, 0003 | <input type="checkbox"/> | 610 - Raitec gear with CG marking - Large | | 3 | Each | 169.8 |
| <input type="checkbox"/> | UCG | 11410CC210000005, 0003 | <input type="checkbox"/> | Installation of Hull Stern Door for (WMSL-Class) See Reference A-A-A425 checklist | | | | 950 |
| <input type="checkbox"/> | UCG | 11503CC210000019, 0001 | <input type="checkbox"/> | test test | | 15 | Each | |

| Step | Action |
|------|--|
| 8. | Click the Go button to initiate the search. |

Saved Search: Unassigned Requisitions | **Go** | Personalize



Demand Workbench

* Indicates required field

Document Builder

Type: New Award
 * OU: UCG Organization
 Number of Lines: 0

Saved Searches: Unassigned Requisitions

Select Requests: Add Return Workload Assignment

| OU | Requisition | Info | Item/Job | IDV Line | Qty | Unit |
|-----|------------------------|------|--|----------|-----|------|
| UCG | 11503PR210000001, 0001 | | Test 12 | | 50 | Each |
| UCG | 11503PR210000001, 0002 | | Test 12 | | 50 | Each |
| UCG | 11503CC210000041, 0001 | | test test | | 16 | Each |
| UCG | 11503CC210000039, 0001 | | Boat Crew Survival Vest (Orange) Contains five (5) pockets sized to fit the equipment requirements specified in the USCG | | 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. |

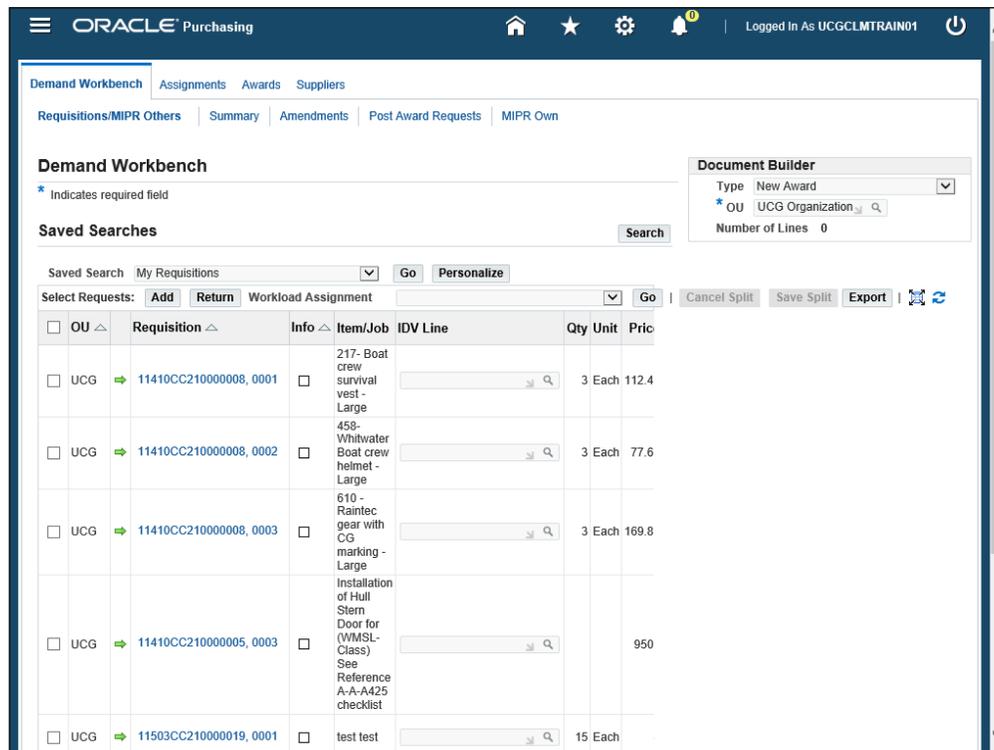
2.3 Personalizing Saved Searches on the Demand Workbench Page

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.



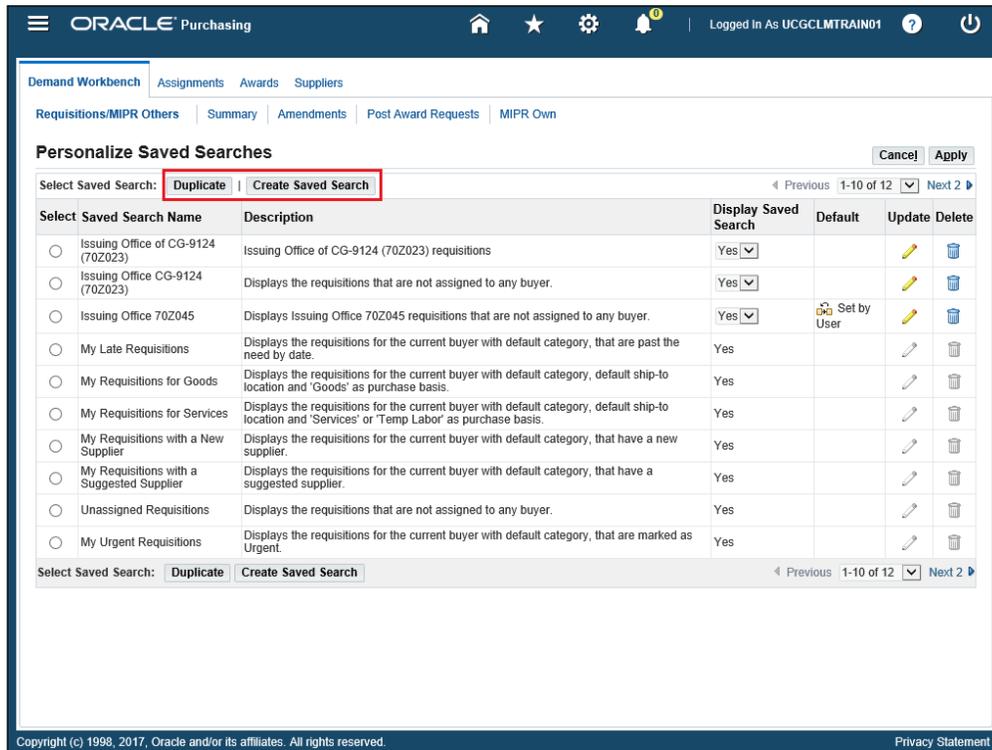
The screenshot shows the Oracle Purchasing Demand Workbench interface. The top navigation bar includes 'Demand Workbench', 'Assignments', 'Awards', and 'Suppliers'. Below this, there are tabs for 'Requisitions/MIPR Others', 'Summary', 'Amendments', 'Post Award Requests', and 'MIPR Own'. The main content area is titled 'Demand Workbench' and includes a 'Document Builder' panel on the right. The 'Document Builder' panel shows 'Type' set to 'New Award', '* OU' set to 'UCG Organization', and 'Number of Lines' set to '0'. Below the 'Demand Workbench' header, there is a 'Saved Searches' section with a 'Search' button. The main table displays a list of requisition lines with columns for 'Requisition', 'Info', 'Item/Job', 'IDV Line', 'Qty', 'Unit', and 'Price'. The table contains five rows of data, including items like '217- Boat crew survival vest - Large', '458- Whitwater Boat crew helmet - Large', '610 - Raintec gear with CG marking - Large', and 'Installation of Hull Stern Door for (WMSL-Class) See Reference A-A-A425 checklist'. The last row is a 'test test' item with a quantity of 15.

| Requisition | Info | Item/Job | IDV Line | Qty | Unit | Price |
|------------------------------|------|---|----------|-----|------|-------|
| UCG ⇒ 11410CC210000008, 0001 | | 217- Boat crew survival vest - Large | | 3 | Each | 112.4 |
| UCG ⇒ 11410CC210000008, 0002 | | 458- Whitwater Boat crew helmet - Large | | 3 | Each | 77.6 |
| UCG ⇒ 11410CC210000008, 0003 | | 610 - Raintec gear with CG marking - Large | | 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 | | 15 | Each | |

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

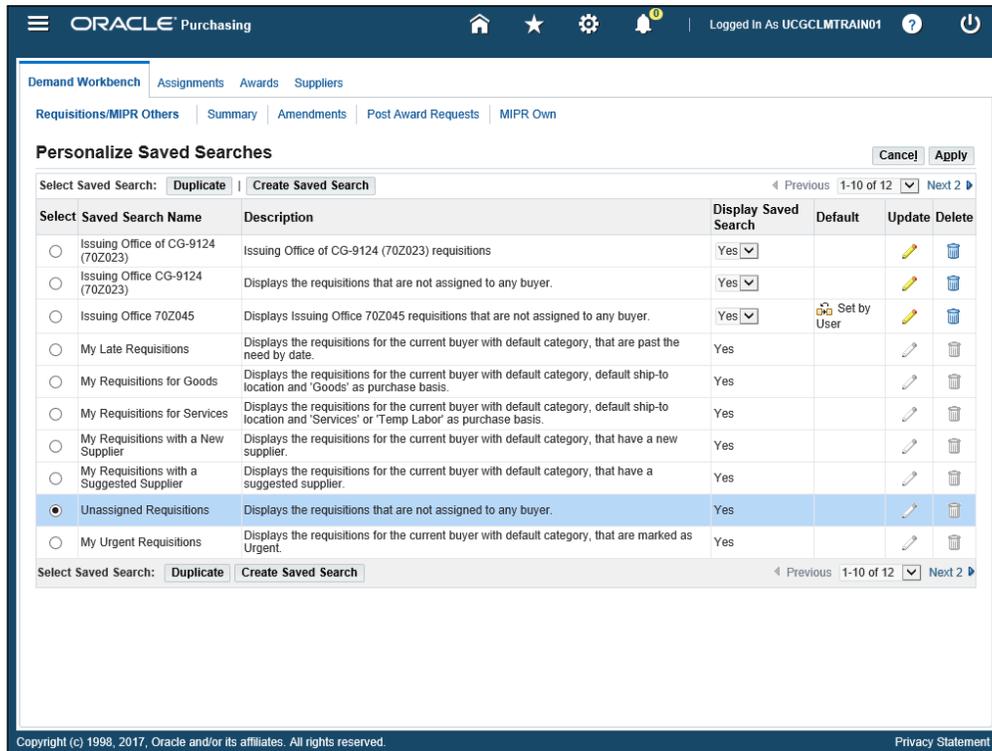
| Step | Action |
|------|---|
| 2. | Click the Personalize button to modify an existing saved search or create a new personalized saved search. |

Saved Search Go Personalize

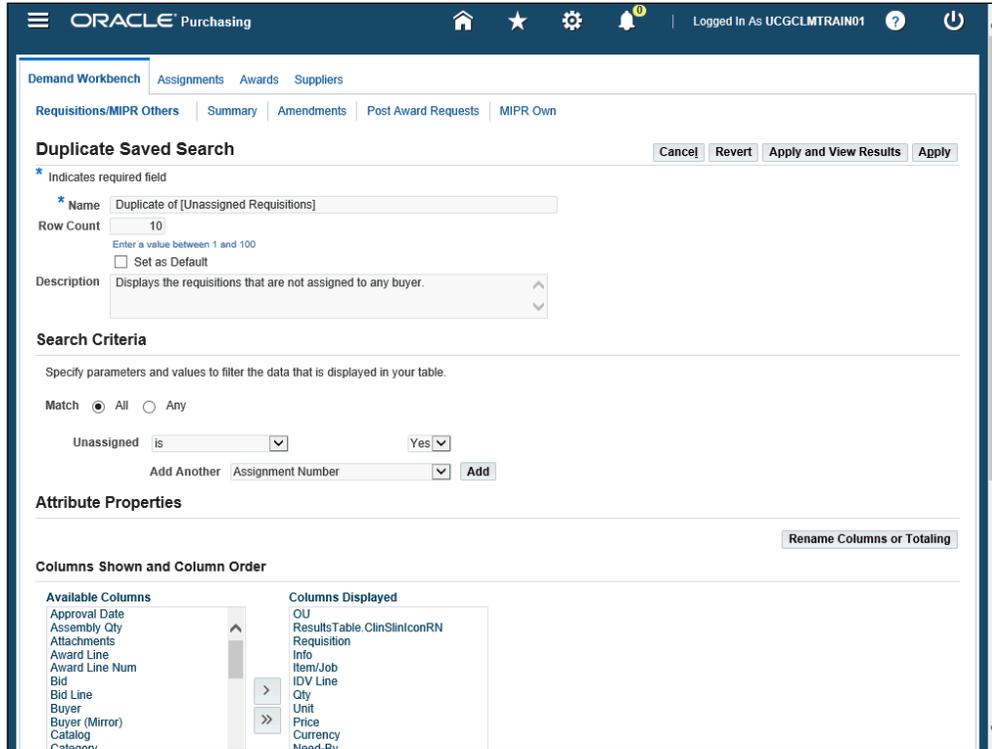


| Step | Action |
|------|---|
| 3. | <p>The Personalize Saved Searches page displays.</p> <p>Personalized saved searches are created by either:</p> <ul style="list-style-type: none"> ○ Copying an existing saved search and then modifying it as needed (Duplicate button) ○ Creating a new saved search from scratch (Create Saved Search button) <p>This lesson outlines the steps for copying an existing saved search and modifying it to create a new personalized saved search.</p> |

| Step | Action |
|------|---|
| 4. | <p>First, select the saved search that will be copied by clicking the corresponding Select radio button.</p>  |



| Step | Action |
|------|--|
| 5. | <p>Click the Duplicate button to create a copy of the saved search and modify its attributes.</p> <p>Personalize Saved Searches</p>  |



Duplicate Saved Search Cancel Revert Apply and View Results Apply

* Indicates required field

* Name Duplicate of [Unassigned Requisitions]

Row Count 10
Enter a value between 1 and 100
 Set as Default

Description Displays the requisitions that are not assigned to any buyer.

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match All Any

Unassigned is Yes

Add Another Assignment Number Add

Attribute Properties Rename Columns or Totaling

Columns Shown and Column Order

| Available Columns | Columns Displayed |
|-------------------|-----------------------------|
| Approval Date | OU |
| Assembly Qty | ResultsTable.ClinSlinIconRN |
| Attachments | Requisition |
| Award Line | Info |
| Award Line Num | Item/Job |
| Bid | IDV Line |
| Bid Line | Qty |
| Buyer | Unit |
| Buyer (Mirror) | Price |
| Catalog | Currency |
| Category | Need-By |

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

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Duplicate Saved Search | Cancel | Revert | Apply and View Results | Apply

* Indicates required field

* Name: Unassigned Requisitions by Category (Goods)

Row Count: 10 (Enter a value between 1 and 100)

Set as Default

Description: Displays the requisitions that are not assigned to any buyer.

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match: All Any

Unassigned is [dropdown] Yes [dropdown]

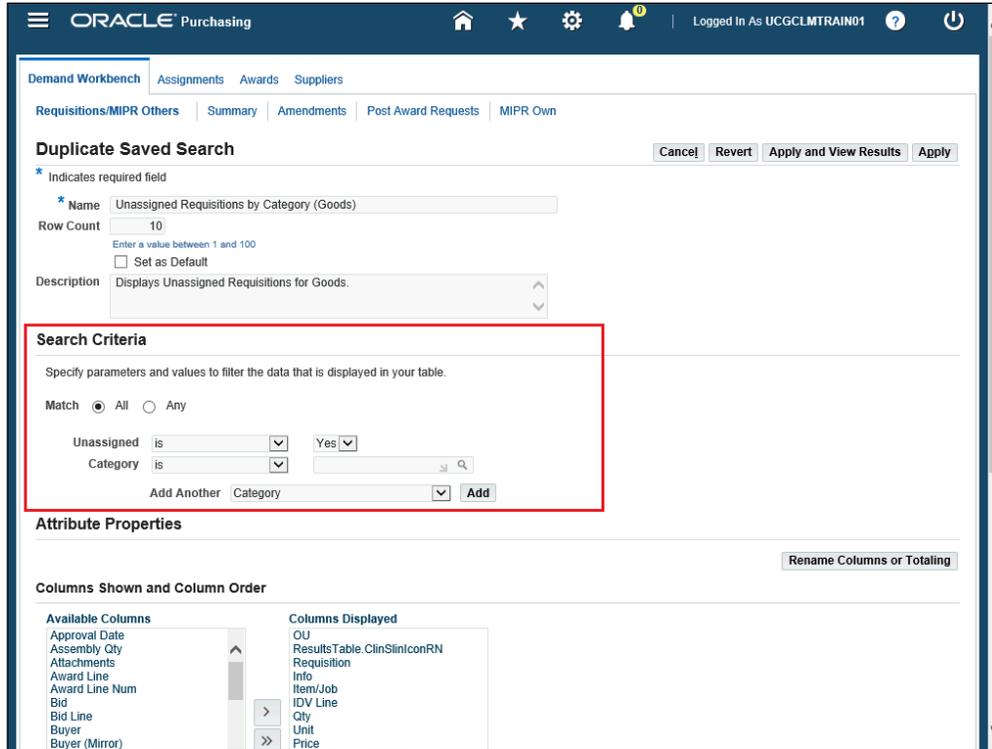
Add Another: Assignment Number [dropdown] Add

Attribute Properties | Rename Columns or Totaling

Columns Shown and Column Order

| Available Columns | Columns Displayed |
|-------------------|-----------------------------|
| Approval Date | OU |
| Assembly Qty | ResultsTable.ClinSlinIconRN |
| Attachments | Requisition |
| Award Line | Info |
| Award Line Num | Item/Job |
| Bid | IDV Line |
| Bid Line | Qty |
| Buyer | Unit |
| Buyer (Mirror) | Price |
| Catalog | Currency |
| Category | Need-By |

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



Duplicate Saved Search [Cancel] [Revert] [Apply and View Results] [Apply]

* Indicates required field

* Name: Unassigned Requisitions by Category (Goods)

Row Count: 10
Enter a value between 1 and 100
 Set as Default

Description: Displays Unassigned Requisitions for Goods.

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match: All Any

Unassigned is [v] Yes [v]

Category is [v] [magnifying glass icon]

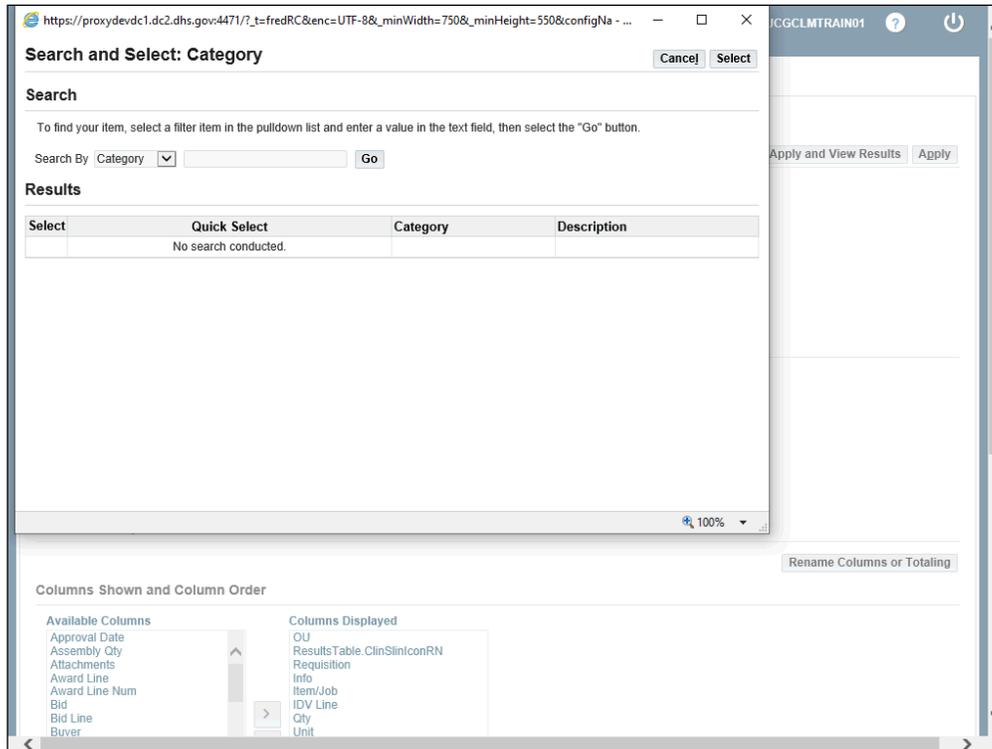
Add Another [v] [Add]

Attribute Properties [Rename Columns or Totaling]

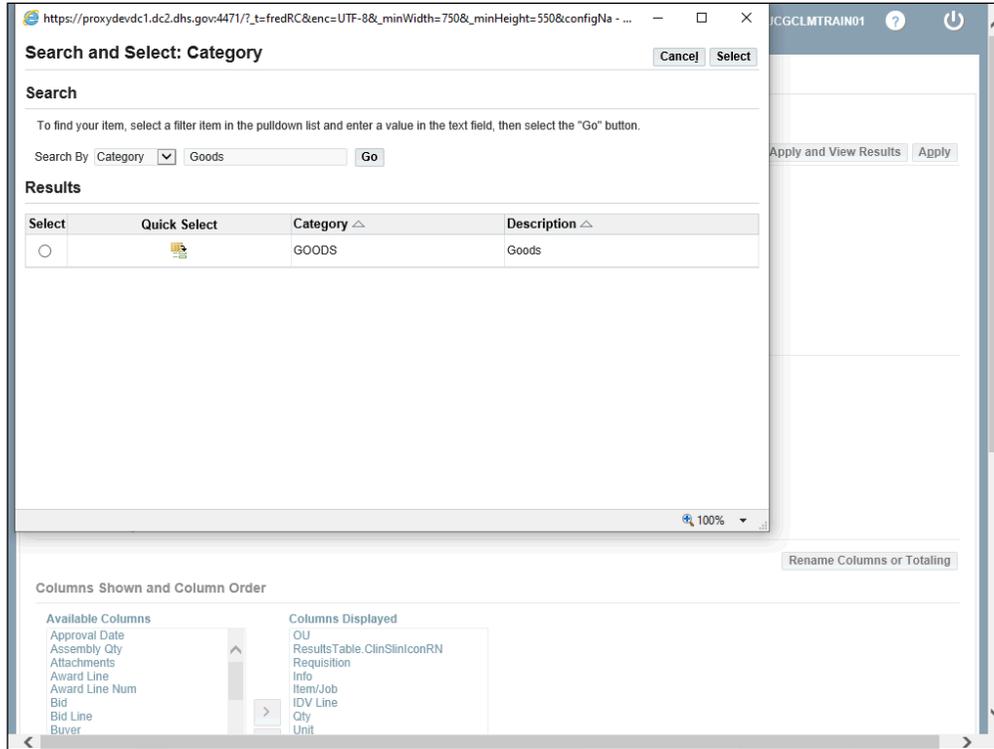
Columns Shown and Column Order

| Available Columns | Columns Displayed |
|-------------------|-----------------------------|
| Approval Date | OU |
| Assembly Qty | ResultsTable.ClinSlinIconRN |
| Attachments | Requisition |
| Award Line | Info |
| Award Line Num | Item/Job |
| Bid | IDV Line |
| Bid Line | Qty |
| Buyer | Unit |
| Buyer (Mirror) | Price |

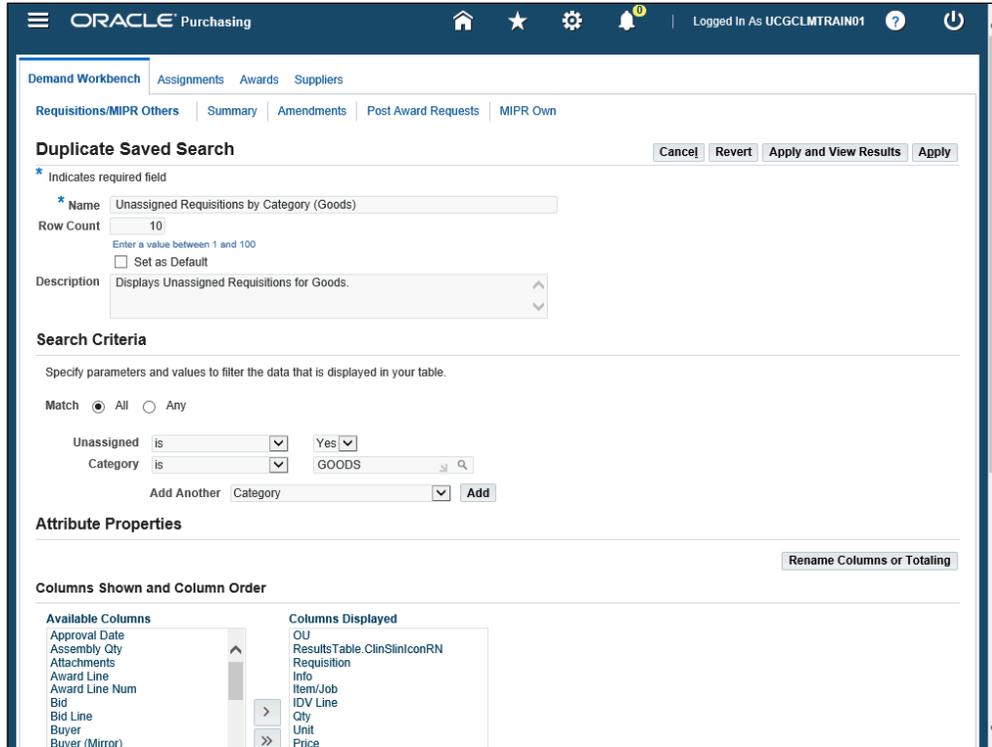
| Step | Action |
|------|---|
| 10. | Use the Search Criteria section to add any additional filters to the saved search. This lesson demonstrates the steps for adding a new filter to the saved search in order to limit the search to those unassigned Requisition Lines for goods. |
| 11. | Click the Category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



| Step | Action |
|------|--|
| 12. | <p>The Search and Select: Category page displays in a new window.</p> <p>Click in the Search By field.</p> <p>Search By Category <input type="text"/> Go</p> |
| 13. | <p>Enter the applicable information into the Search By field.</p> <p>Search By Category <input type="text"/> Go</p> |
| 14. | <p>Click the Go button to initiate the search.</p> <p>Search By Category Goods x Go</p> |



| Step | Action | | | | | | |
|-----------------------|--|---|--------------|---|-----------------------|---|-------|
| 15. | <p>The search results display.</p> <p>Click the Quick Select icon for the applicable Category.</p> <table border="1" data-bbox="324 1165 1055 1270"> <thead> <tr> <th>Select</th> <th>Quick Select</th> <th>Category </th> </tr> </thead> <tbody> <tr> <td><input type="radio"/></td> <td></td> <td>GOODS</td> </tr> </tbody> </table> | Select | Quick Select | Category  | <input type="radio"/> |  | GOODS |
| Select | Quick Select | Category  | | | | | |
| <input type="radio"/> |  | GOODS | | | | | |



ORACLE Purchasing

Logged In As UCGCLMTRAIN01

Demand Workbench | Assignments | Awards | Suppliers

Requisitions/MIPR Others | Summary | Amendments | Post Award Requests | MIPR Own

Duplicate Saved Search [Cancel] [Revert] [Apply and View Results] [Apply]

* Indicates required field

* Name: Unassigned Requisitions by Category (Goods)

Row Count: 10
Enter a value between 1 and 100
 Set as Default

Description: Displays Unassigned Requisitions for Goods.

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match: All Any

Unassigned is: [dropdown] Yes [dropdown]
Category is: [dropdown] GOODS [dropdown]

Add Another: [dropdown] [Add]

Attribute Properties [Rename Columns or Totaling]

Columns Shown and Column Order

| Available Columns | Columns Displayed |
|-------------------|----------------------------|
| Approval Date | OU |
| Assembly Qty | ResultsTable.ClinSlnIconRN |
| Attachments | Requisition |
| Award Line | Info |
| Award Line Num | Item/Job |
| Bid | IDV Line |
| Bid Line | Qty |
| Buyer | Unit |
| Buyer (Mirror) | Price |

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

Unassigned is Yes

Category is GOODS

Add Another Category

Attribute Properties

Columns Shown and Column Order

Available Columns

- Approval Date
- Assembly Qty
- Attachments
- Award Line
- Award Line Num
- Bid
- Bid Line
- Buyer
- Buyer (Mirror)
- Catalog
- Category
- Changed Amount
- Changed Funded Amount
- Changed Quantity
- Comments
- Contractor End Date
- Contractor First Name
- Contractor Last Name
- Contractor Start Date
- Creation Date

Columns Displayed

- OU
- ResultsTable.ClinSlinIconRN
- Requisition
- Info
- Item/Job
- IDV Line
- Qty
- Unit
- Price
- Currency
- Need-By
- Assignment
- Source
- Options
- Actions

TIP Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

| | Column Name | Sort Order |
|-------------|------------------------------------|------------------------------------|
| First Sort | Creation Date <input type="text"/> | descending <input type="text"/> |
| Second Sort | <input type="text"/> | no sort order <input type="text"/> |
| Third Sort | <input type="text"/> | no sort order <input type="text"/> |

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

Unassigned is Yes

Category is GOODS

Add Another Category

Attribute Properties

Columns Shown and Column Order

Available Columns

- Approval Date
- Assembly Qty
- Attachments
- Award Line
- Award Line Num
- Bid
- Bid Line
- Buyer
- Buyer (Mirror)
- Catalog
- Category
- Changed Amount
- Changed Funded Amount
- Changed Quantity
- Comments
- Contractor End Date
- Contractor First Name
- Contractor Last Name
- Contractor Start Date
- Creation Date

Columns Displayed

- OU
- ResultsTable.ClinSlinIconRN
- Requisition
- Info
- Item/Job
- IDV Line
- Qty
- Unit
- Price
- Currency
- Need-By
- Assignment
- Source
- Options
- Actions

TIP Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

| | Column Name | Sort Order |
|-------------|------------------------------------|------------------------------------|
| First Sort | Creation Date <input type="text"/> | descending <input type="text"/> |
| Second Sort | <input type="text"/> | no sort order <input type="text"/> |
| Third Sort | <input type="text"/> | no sort order <input type="text"/> |

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

Unassigned is Yes

Category is GOODS

Add Another Category

Attribute Properties

Columns Shown and Column Order

Available Columns

- Approval Date
- Assembly Qty
- Attachments
- Award Line
- Award Line Num
- Bid
- Bid Line
- Buyer
- Buyer (Mirror)
- Catalog
- Category
- Changed Amount
- Changed Funded Amount
- Changed Quantity
- Comments
- Contractor End Date
- Contractor First Name
- Contractor Last Name
- Contractor Start Date
- Creation Date

Columns Displayed

- OU
- ResultsTable.ClinSlinIconRN
- Requisition
- Info
- Item/Job
- IDV Line
- Qty
- Unit
- Price
- Currency
- Need-By
- Assignment
- Source
- Options
- Actions

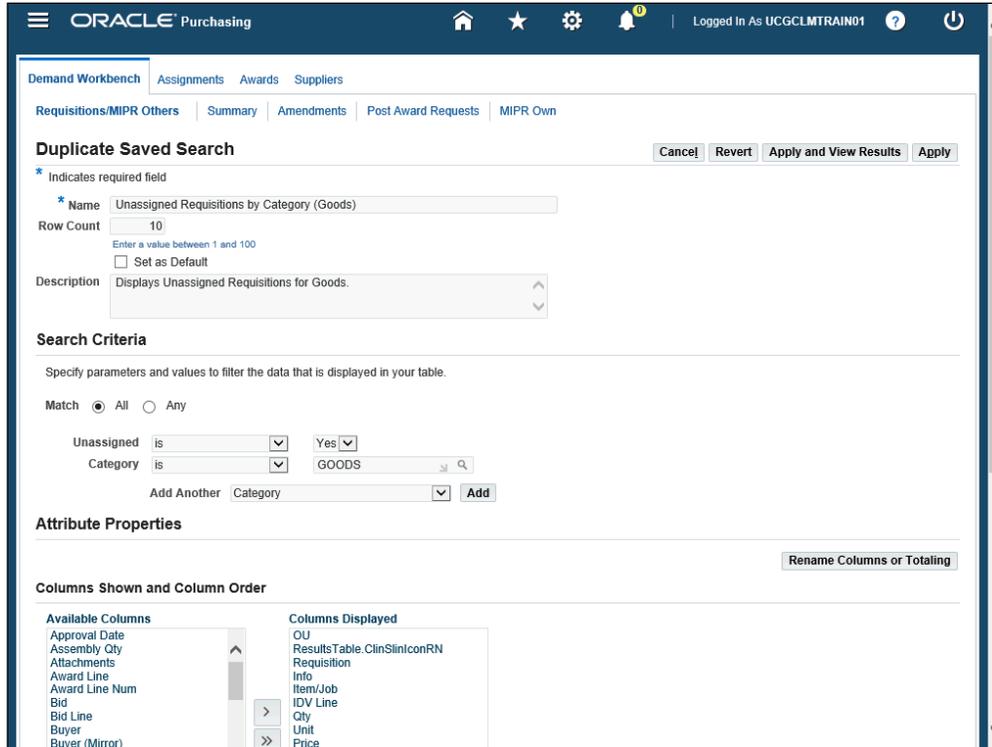
TIP Columns with totaling capabilities shown can only display as the end column of the table.

Sort Settings

| | Column Name | Sort Order |
|-------------|------------------------------------|------------------------------------|
| First Sort | Creation Date <input type="text"/> | descending <input type="text"/> |
| Second Sort | <input type="text"/> | no sort order <input type="text"/> |
| Third Sort | <input type="text"/> | no sort order <input type="text"/> |

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| Step | Action |
|------|--|
| 19. | Use the Sort Settings 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. |



Duplicate Saved Search Cancel Revert Apply and View Results Apply

* Indicates required field

* Name

Row Count
Enter a value between 1 and 100

Set as Default

Description

Search Criteria

Specify parameters and values to filter the data that is displayed in your table.

Match All Any

Unassigned is Yes

Category is GOODS

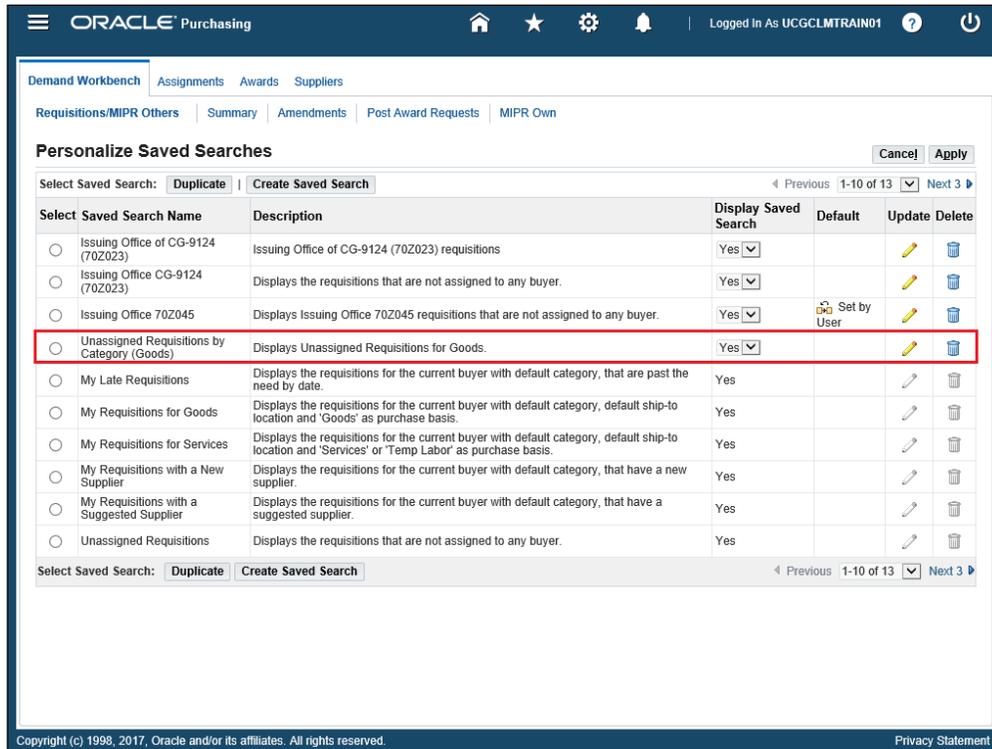
Add Another

Attribute Properties Rename Columns or Totaling

Columns Shown and Column Order

| Available Columns | Columns Displayed |
|-------------------|----------------------------|
| Approval Date | OU |
| Assembly Qty | ResultsTable.ClinSlnlconRN |
| Attachments | Requisition |
| Award Line | Info |
| Award Line Num | Item/Job |
| Bid | IDV Line |
| Bid Line | Qty |
| Buyer | Unit |
| Buyer (Mirror) | Price |

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



Personalize Saved Searches Cancel Apply

Select Saved Search: Duplicate | Create Saved Search Previous 1-10 of 13 Next 3

| Select | Saved Search Name | Description | Display Saved Search | Default | Update | Delete |
|-----------------------|---|---|----------------------|-------------|--------|--------|
| <input type="radio"/> | Issuing Office of CG-9124 (70Z023) | Issuing Office of CG-9124 (70Z023) requisitions | Yes | | | |
| <input type="radio"/> | Issuing Office CG-9124 (70Z023) | Displays the requisitions that are not assigned to any buyer. | Yes | | | |
| <input type="radio"/> | Issuing Office 70Z045 | Displays Issuing Office 70Z045 requisitions that are not assigned to any buyer. | Yes | Set by User | | |
| <input type="radio"/> | Unassigned Requisitions by Category (Goods) | Displays Unassigned Requisitions for Goods. | Yes | | | |
| <input type="radio"/> | My Late Requisitions | Displays the requisitions for the current buyer with default category, that are past the need by date. | Yes | | | |
| <input type="radio"/> | My Requisitions for Goods | Displays the requisitions for the current buyer with default category, default ship-to location and 'Goods' as purchase basis. | Yes | | | |
| <input type="radio"/> | 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 | | | |
| <input type="radio"/> | My Requisitions with a New Supplier | Displays the requisitions for the current buyer with default category, that have a new supplier. | Yes | | | |
| <input type="radio"/> | My Requisitions with a Suggested Supplier | Displays the requisitions for the current buyer with default category, that have a suggested supplier. | Yes | | | |
| <input type="radio"/> | Unassigned Requisitions | Displays the requisitions that are not assigned to any buyer. | Yes | | | |

Select Saved Search: Duplicate | Create Saved Search Previous 1-10 of 13 Next 3

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

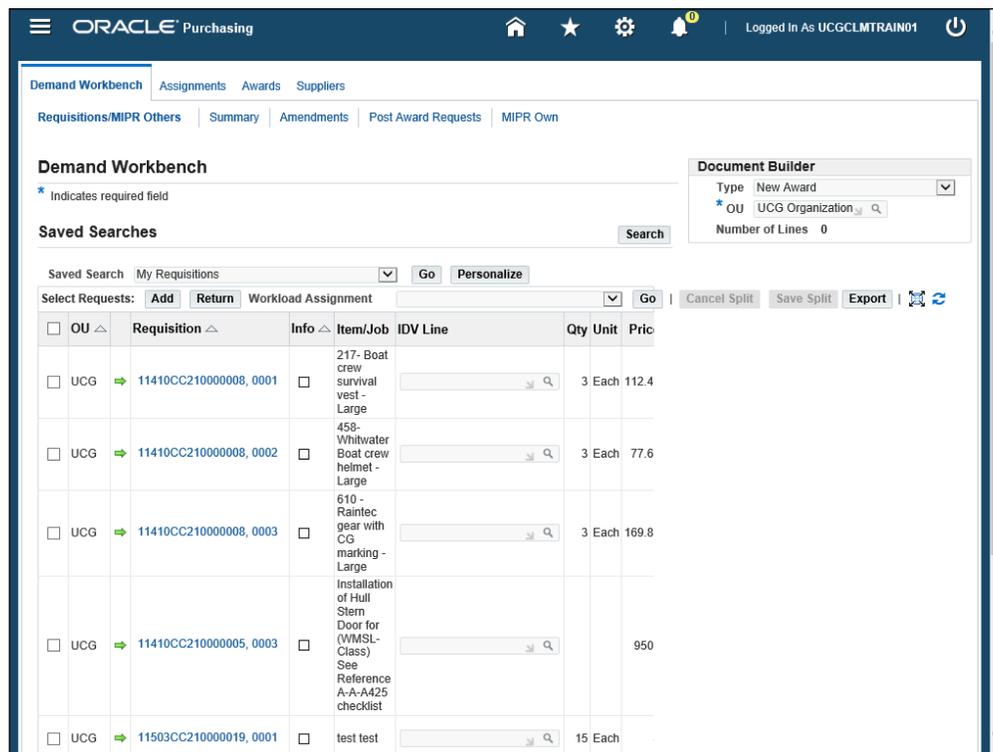
2.4 Performing Searches on the Demand Workbench Page

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.

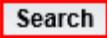
Objective: In this lesson, the Miscellaneous Obligations user will learn the steps required to perform searches using the Search functionality on the **Demand Workbench** page.

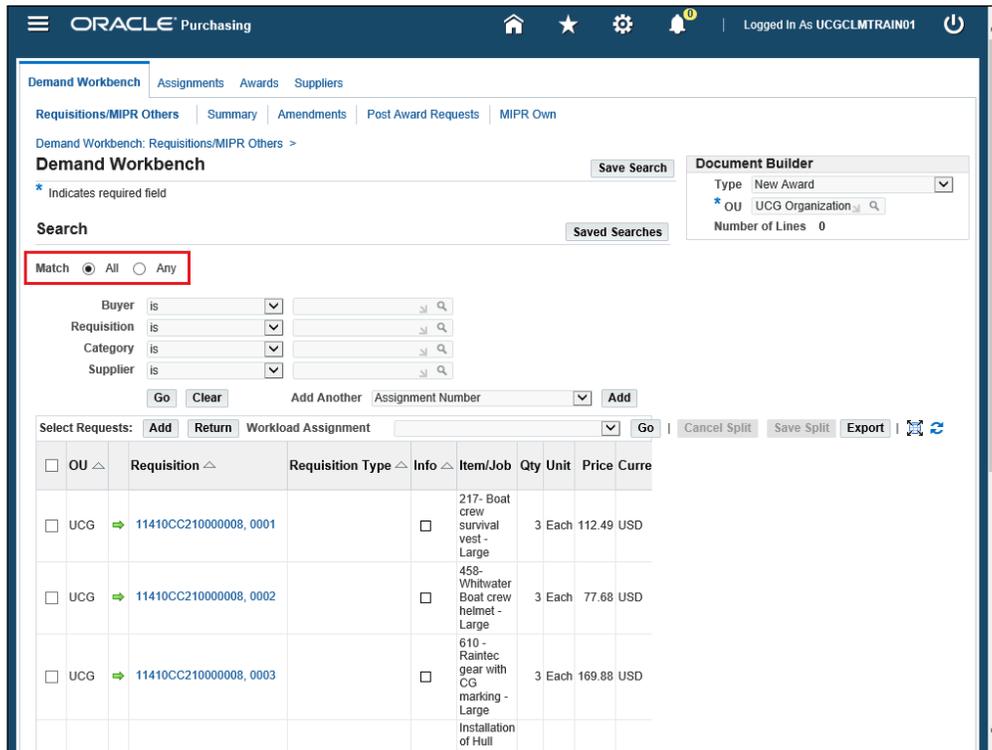
Scenario: Upon review of the existing saved searches, you have determined that the existing saved searches do not yield your desired search results. Using the CLIENT Miscellaneous Obligation Preparer responsibility, you will perform a search for Requisition Lines using specific search criteria.



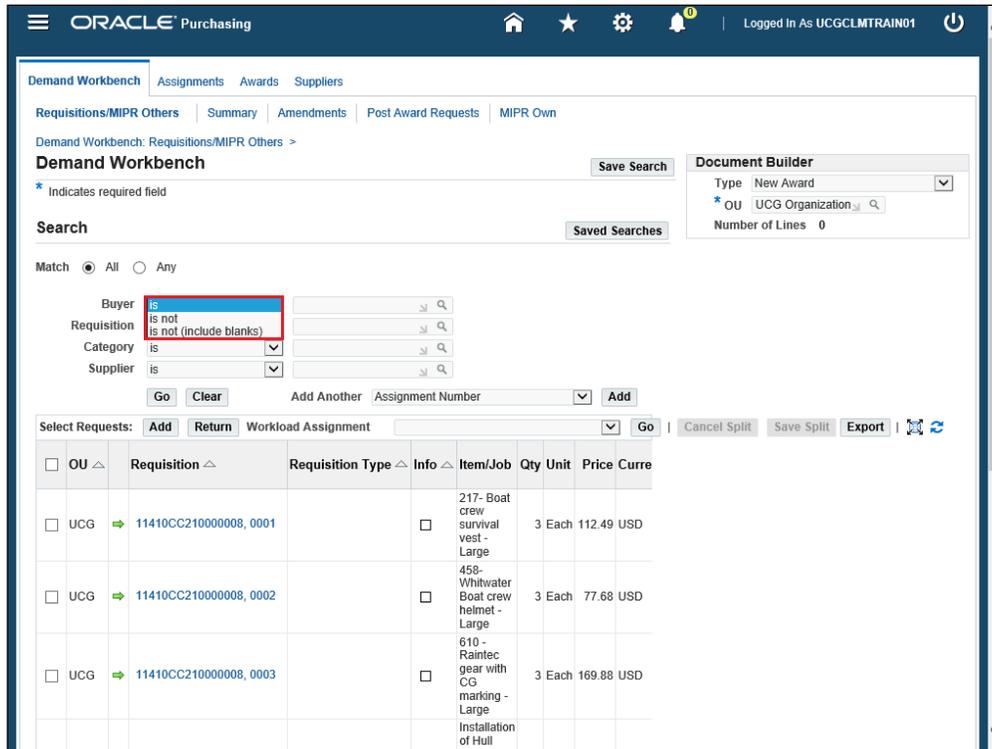
The screenshot shows the Oracle Purchasing Demand Workbench interface. The top navigation bar includes 'ORACLE Purchasing', a home icon, a star icon, a settings icon, a notification bell, and the user 'Logged In As UGCLMTRAIN01'. Below the navigation bar, there are tabs for 'Demand Workbench', 'Assignments', 'Awards', and 'Suppliers'. Under 'Demand Workbench', there are sub-tabs for 'Requisitions/MIPR Others', 'Summary', 'Amendments', 'Post Award Requests', and 'MIPR Own'. The main content area is titled 'Demand Workbench' and includes a 'Document Builder' panel on the right with a 'Type' dropdown set to 'New Award', a '*OU' dropdown set to 'UCG Organization', and a 'Number of Lines' field set to '0'. Below this is a 'Saved Searches' section with a 'Search' button. The main table displays a list of requisitions with columns for 'OU', 'Requisition', 'Info', 'Item/Job', 'IDV Line', 'Qty', 'Unit', and 'Pric'. The table contains five rows of data, including items like '217- Boat crew survival vest - Large', '458- Whitewater Boat crew helmet - Large', '610 - Raintec gear with CG marking - Large', and 'Installation of Hull Stern Door for (WMSL-Class) Site Reference A-A-A425 checklist'. A 'test test' row is also present at the bottom.

| Step | Action |
|------|--|
| 1. | This lesson begins on the Demand Workbench page. Refer to the "Using Saved Searches on the Demand Workbench Page" lesson for the detailed steps on how to navigate to this page. |

| Step | Action |
|------|--|
| 2. | Click the Search button to use the Search functionality.  |



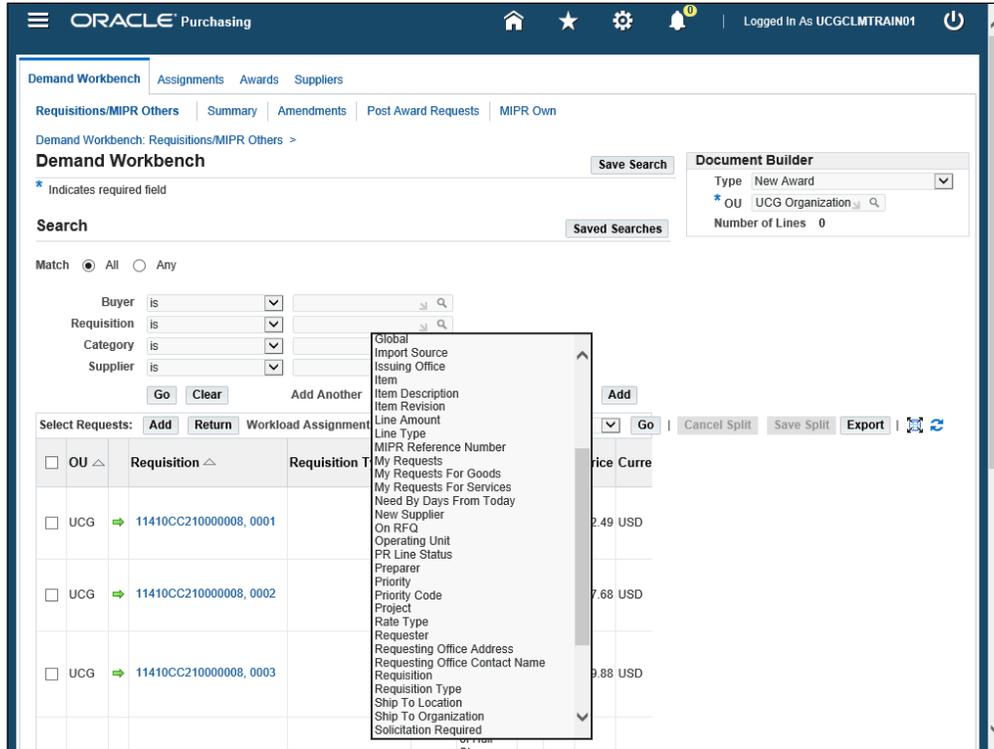
| Step | Action |
|------|--|
| 3. | The Search section displays and enables users to search for Requisition Lines based on specific search criteria. When performing searches, users can choose to require the results to match "All" of the search values or allow them to match "Any" of the search values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



The screenshot shows the Oracle Purchasing Demand Workbench search interface. The search criteria section includes dropdown menus for Buyer, Requisition, Category, and Supplier. The Requisition dropdown is highlighted with a red box, showing options: 'is', 'is not', and 'is not (include blanks)'. Below the search criteria are buttons for 'Go', 'Clear', 'Add Another', and 'Add'. A table of search results is displayed below, with columns for Requisition, Requisition Type, Info, Item/Job, Qty, Unit, Price, and Curre. The table contains three rows of requisition data.

| OU | Requisition | Requisition Type | Info | Item/Job | Qty | Unit | Price | Curre |
|-----|------------------------|------------------|------|--|-----|------|--------|-------|
| UCG | 11410CC210000008, 0001 | | | 217- Boat crew survival vest - Large | 3 | Each | 112.49 | USD |
| UCG | 11410CC210000008, 0002 | | | 458- Whitewater Boat crew helmet - Large | 3 | Each | 77.68 | USD |
| UCG | 11410CC210000008, 0003 | | | 610 - Raintec gear with CG marking - Large | 3 | Each | 169.88 | USD |

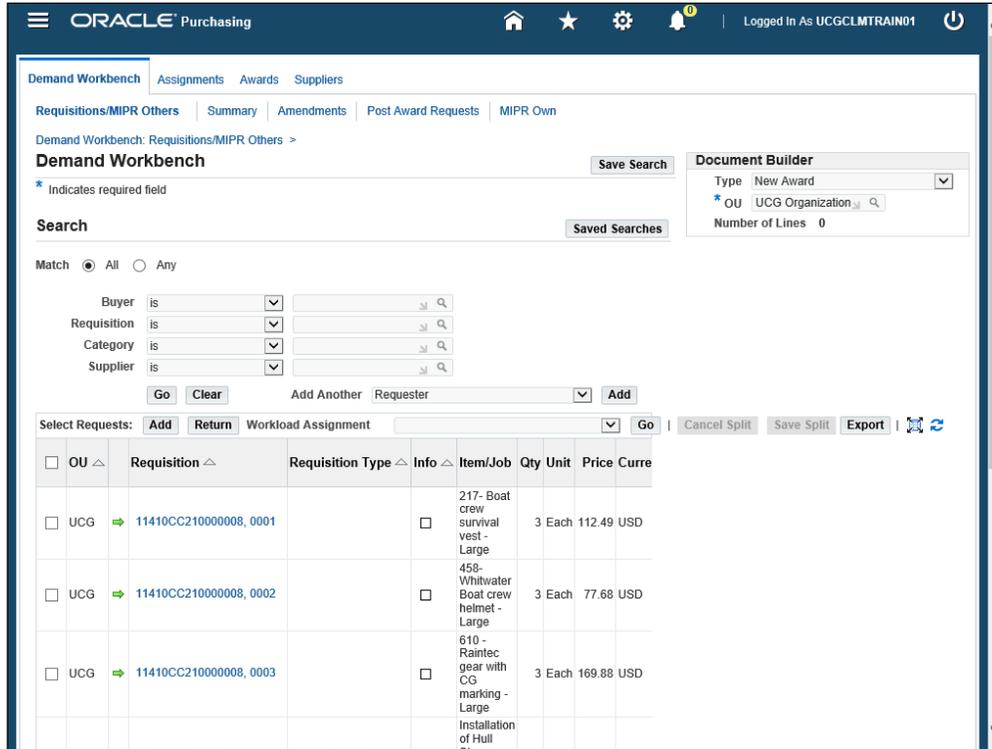
| Step | Action |
|------|---|
| 4. | <p>For each search criteria attribute, there is a condition dropdown button. The conditions that appear in the dropdown vary based on the selected attribute. The primary conditions are:</p> <ul style="list-style-type: none"> ○ Is: Records that have an attribute value equal to the value specified in the criteria ○ Is Not: Records that have an attribute value that is not equal to the value specified in the criteria ○ Is Not (include blanks): Records that have an attribute value that is not equal to the value specified and accepts blanks as valid values <p>After specifying your search criteria, click the Go button to display the results. Optionally, you can click the Clear button to reset the search fields.</p> |
| 5. | <p>The following steps demonstrate the procedure for adding a search parameter and conducting a search.</p> <p>Click the Add Another dropdown button to select and add another search criteria field.</p>  <p>The screenshot shows the 'Add Another' dropdown button with the text 'Assignment Number' and a dropdown arrow icon, followed by an 'Add' button.</p> |



Oracle Purchasing interface showing search filters and a dropdown menu. The dropdown menu lists search criteria fields, with 'Requester' highlighted. The table below shows requisition details for three items.

| Select Requests: | Add | Return | Workload Assignment | OU | Requisition | Requisition T | Rate Type | Requester | Requesting Office Address | Price Curre |
|--------------------------|-----|--------|---------------------|-----|------------------------|---------------|-----------|-----------|---------------------------|-------------|
| <input type="checkbox"/> | | | | UCG | 11410CC210000008, 0001 | | | | | 2.49 USD |
| <input type="checkbox"/> | | | | UCG | 11410CC210000008, 0002 | | | | | 7.68 USD |
| <input type="checkbox"/> | | | | UCG | 11410CC210000008, 0003 | | | | | 9.88 USD |

| 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 |



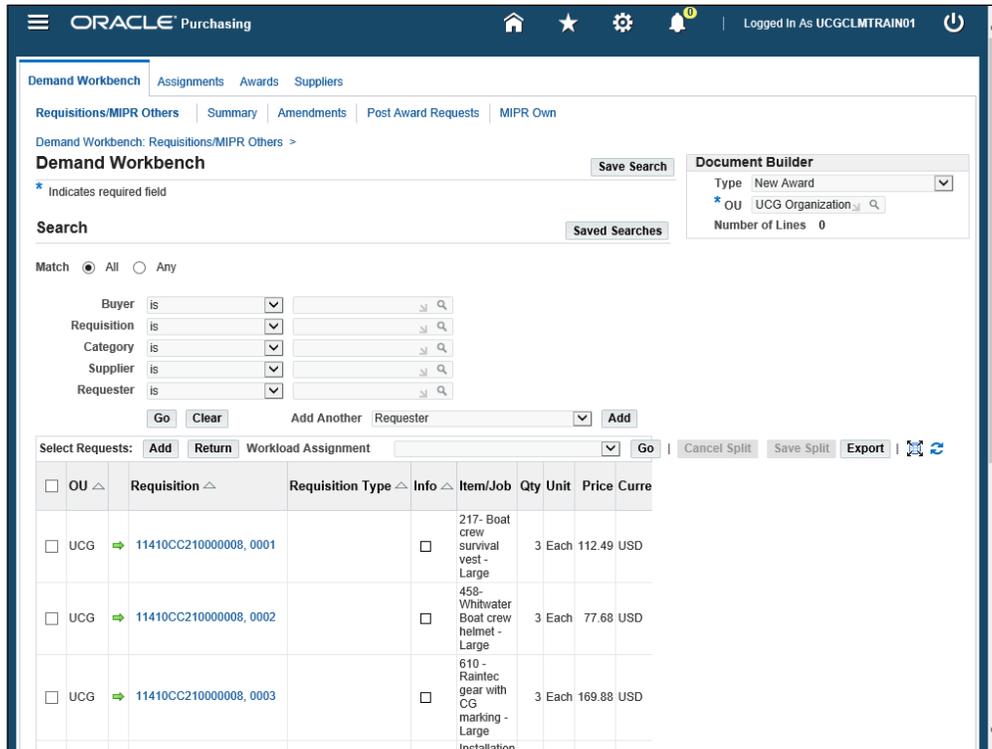
The screenshot shows the Oracle Purchasing Demand Workbench interface. At the top, there are navigation tabs for Demand Workbench, Assignments, Awards, and Suppliers. Below this, there are sub-tabs for Requisitions/MIPR Others, Summary, Amendments, Post Award Requests, and MIPR Own. The main area is titled "Demand Workbench" and includes a "Save Search" button and a "Document Builder" panel. The "Document Builder" panel has a "Type" dropdown set to "New Award", a required field for "OU" set to "UCG Organization", and a "Number of Lines" field set to "0".

The "Search" section includes a "Match" radio button set to "All" and a "Saved Searches" button. Below this are search criteria fields for Buyer, Requisition, Category, and Supplier, each with a dropdown menu and a search icon. There are "Go" and "Clear" buttons, and an "Add Another" dropdown menu with "Requester" selected and an "Add" button.

Below the search section is a table with columns: Select Requests, OU, Requisition, Requisition Type, Info, Item/Job, Qty, Unit, Price, and Curre. The table contains three rows of requisitions:

| Select Requests | OU | Requisition | Requisition Type | Info | Item/Job | Qty | Unit | Price | Curre |
|--------------------------|-----|------------------------|------------------|--------------------------|--|-----|------|--------|-------|
| <input type="checkbox"/> | UCG | 11410CC210000008, 0001 | | <input type="checkbox"/> | 217- Boat crew survival vest - Large | 3 | Each | 112.49 | USD |
| <input type="checkbox"/> | UCG | 11410CC210000008, 0002 | | <input type="checkbox"/> | 458- Whitewater Boat crew helmet - Large | 3 | Each | 77.68 | USD |
| <input type="checkbox"/> | UCG | 11410CC210000008, 0003 | | <input type="checkbox"/> | 610 - Raintec gear with CG marking - Large | 3 | Each | 169.88 | USD |

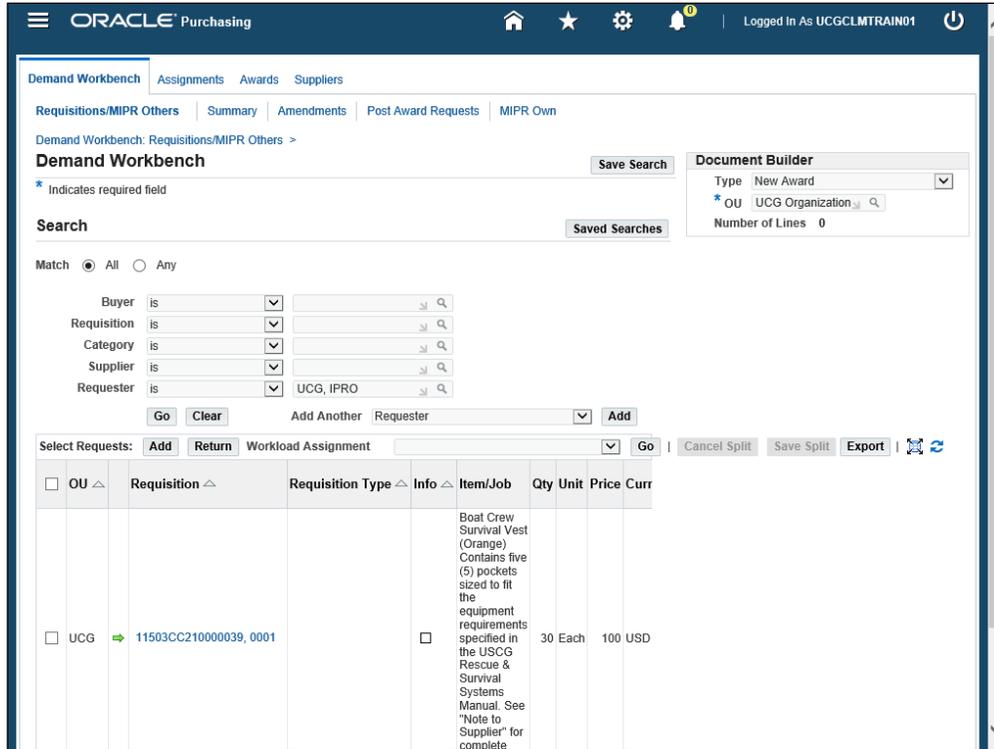
| Step | Action |
|------|---|
| 7. | Click the Add button to add this field as a search criteria field. |
| | Add Another Requester <input type="button" value="Add"/> |



The screenshot shows the Oracle Purchasing Demand Workbench search interface. At the top, there are navigation tabs for 'Demand Workbench', 'Assignments', 'Awards', and 'Suppliers'. Below this, there are sub-tabs for 'Requisitions/MIPR Others', 'Summary', 'Amendments', 'Post Award Requests', and 'MIPR Own'. The main area is titled 'Demand Workbench' and includes a 'Save Search' button and a 'Document Builder' section with dropdowns for 'Type' (New Award) and 'OU' (UCG Organization). A search criteria section is visible with fields for Buyer, Requisition, Category, Supplier, and Requester, each with a search icon. Below the search criteria are buttons for 'Go', 'Clear', 'Add Another', and 'Requester'. At the bottom, there is a table with columns for 'OU', 'Requisition', 'Requisition Type', 'Info', 'Item/Job', 'Qty', 'Unit', 'Price', and 'Curre'. The table contains three rows of requisition data.

| OU | Requisition | Requisition Type | Info | Item/Job | Qty | Unit | Price | Curre |
|-----|------------------------|------------------|------|---|-----|------|--------|-------|
| UCG | 11410CC210000008, 0001 | | | 217- Boat crew survival vest - Large | 3 | Each | 112.49 | USD |
| UCG | 11410CC210000008, 0002 | | | 458- Whitewater Boat crew helmet - Large | 3 | Each | 77.68 | USD |
| UCG | 11410CC210000008, 0003 | | | 610 - Raintec gear with CG marking - Large Installation | 3 | Each | 169.88 | USD |

| Step | Action |
|------|---|
| 8. | <p>The field displays as a search criteria field.</p> <p>Click in the Requester field to enter the appropriate value.</p>  |
| 9. | <p>Enter the appropriate value in the Requester field.</p>  |
| 10. | <p>Click the Go button to initiate the search.</p>  |



The screenshot shows the Oracle Purchasing Demand Workbench interface. The top navigation bar includes 'ORACLE Purchasing' and 'Logged In As UCGLMTRAIN01'. The main content area is titled 'Demand Workbench' and includes a search section with various filters (Buyer, Requisition, Category, Supplier, Requester) and a 'Document Builder' panel. Below the search filters is a table of requisition results.

| OU | Requisition | Requisition Type | Info | Item/Job | Qty | Unit | Price | Curr |
|------------------------------|--|------------------|--------------------------|---|-----|------|-------|------|
| <input type="checkbox"/> UCG | 11503CC210000039, 0001 | | <input type="checkbox"/> | 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 | 30 | Each | 100 | USD |

| Step | Action |
|------|---|
| 11. | The search results display in the bottom portion of the page. |
| 12. | End of Procedure. |

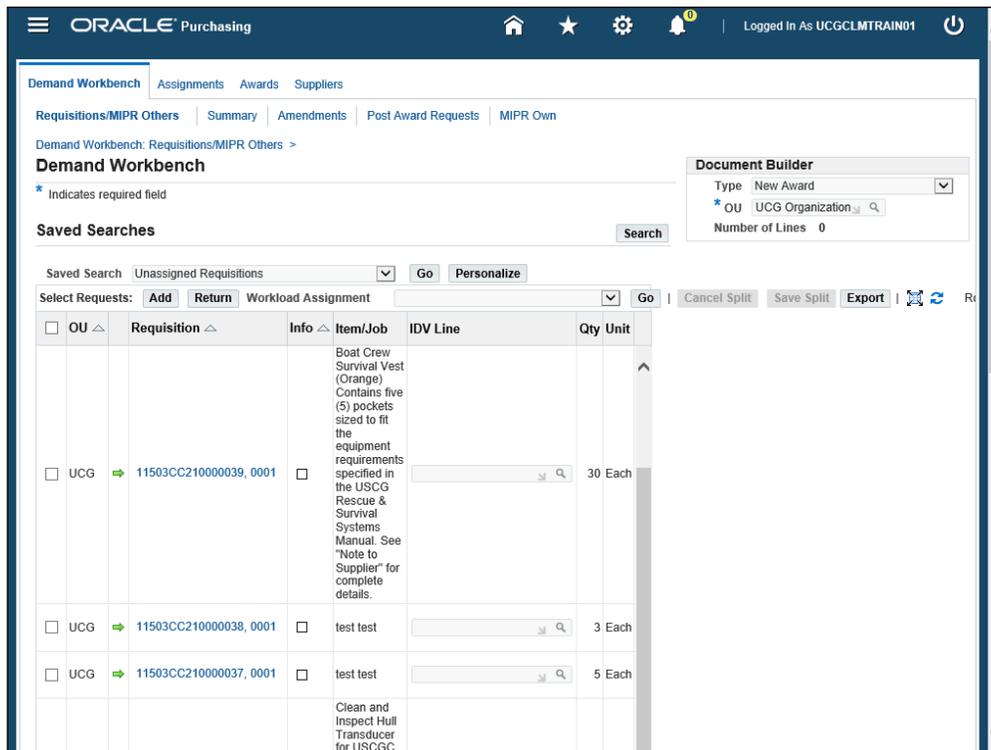
2.5 Returning Requisition Lines to the Requester

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.

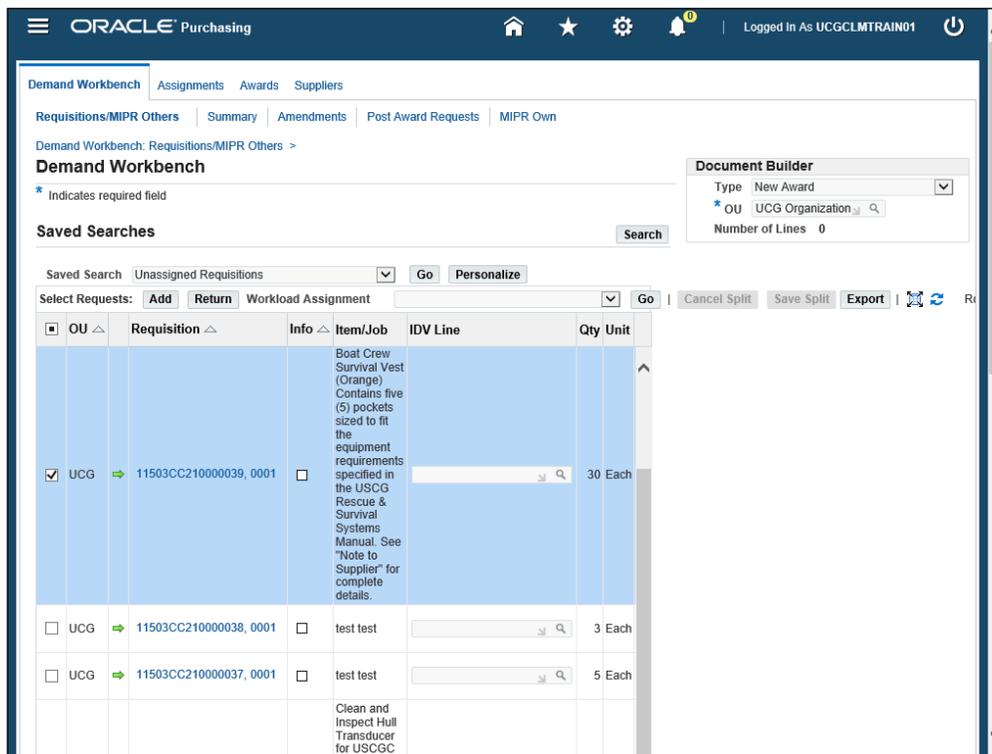


The screenshot displays the Oracle Purchasing Demand Workbench interface. The main content area shows a table of requisition lines with the following data:

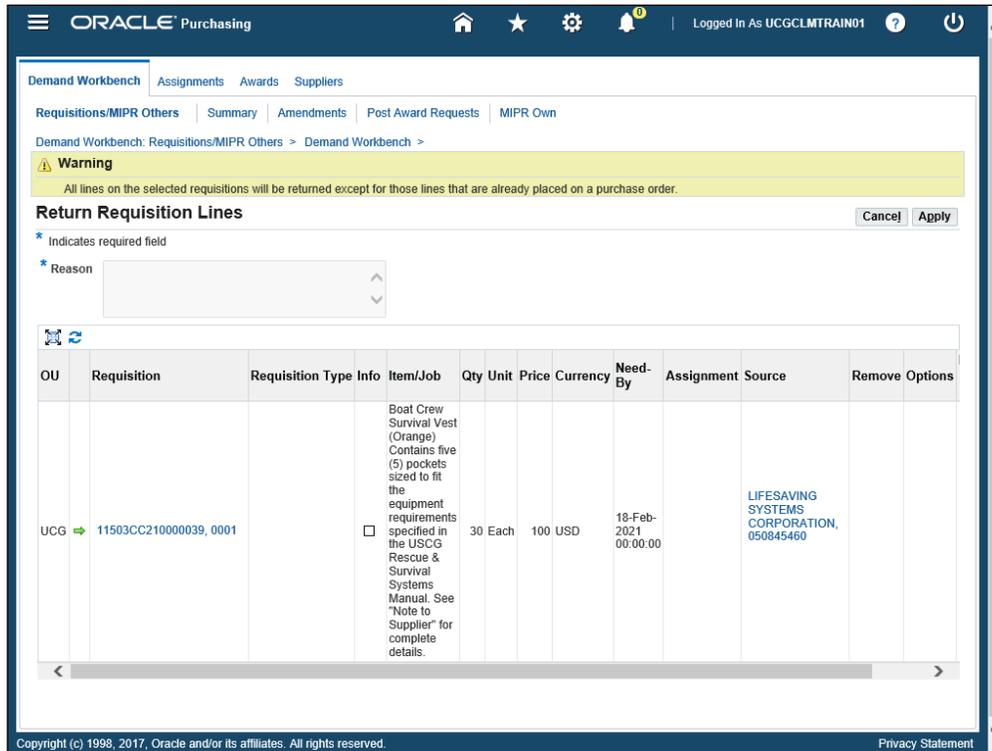
| OU | Requisition | Info | Item/Job | IDV Line | Qty | Unit |
|-----|------------------------|------|---|----------|-----|------|
| UCG | 11503CC210000039, 0001 | | Boat Crew Survival Vest (Orange) Contains five (5) pockets sized to fit the equipment requirements specified in the USCG Rescue & Survival Systems Manual. See "Note to Supplier" for complete details. | | 30 | Each |
| UCG | 11503CC210000038, 0001 | | test test | | 3 | Each |
| UCG | 11503CC210000037, 0001 | | test test | | 5 | Each |
| | | | Clean and Inspect Hull Transducer for USCGC | | | |

The interface includes a top navigation bar with 'ORACLE Purchasing' and a user profile 'Logged In As UCGLMTRAIN01'. Below the navigation, there are tabs for 'Demand Workbench', 'Assignments', 'Awards', and 'Suppliers'. The 'Demand Workbench' tab is active, showing sub-tabs for 'Requisitions/MIPR Others', 'Summary', 'Amendments', 'Post Award Requests', and 'MIPR Own'. A 'Document Builder' panel on the right shows 'Type: New Award' and '* OU: UCG Organization'. A 'Saved Searches' section at the bottom left shows a search for 'Unassigned Requisitions'.

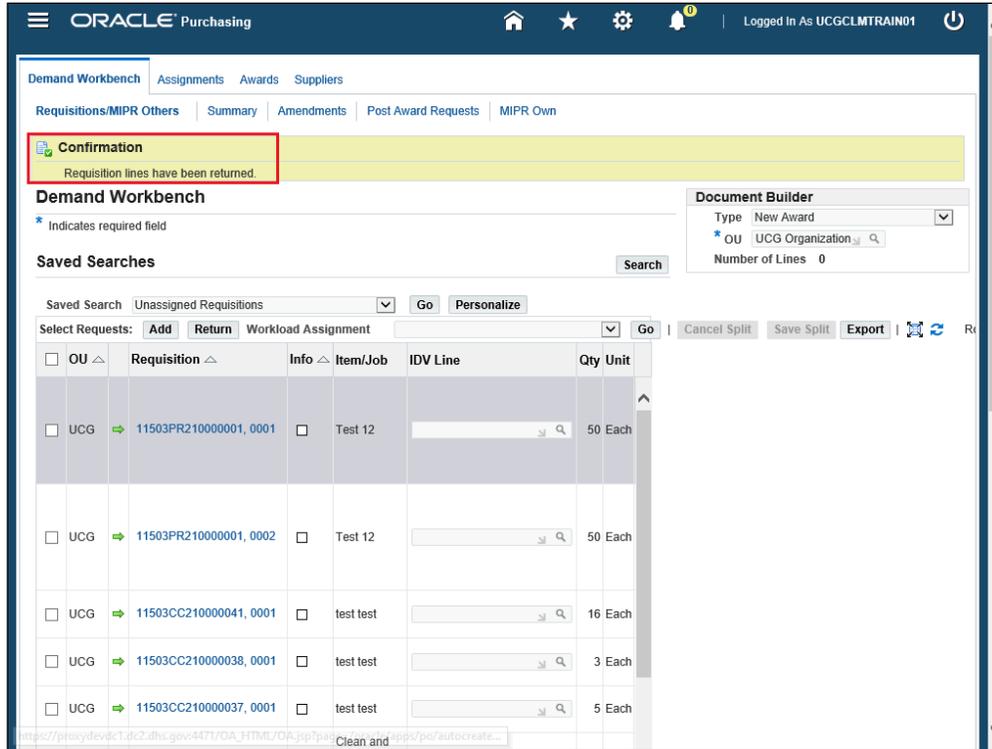
| Step | Action |
|------|---|
| 1. | <p>This lesson begins on the Demand Workbench page.</p> <p>Refer to the "Using Saved Searches on the Demand Workbench Page" lesson for the detailed steps on how to navigate to this page.</p> |
| 2. | <p>To return Requisition Lines to a Requester, select the appropriate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



| Step | Action |
|------|---|
| 3. | <p>Click the Return button.</p>  |



| Step | Action |
|------|---|
| 4. | <p>The Return Requisition Lines page displays and a warning message displays at the top of the page.</p> <p>Click in the Reason field.</p> <p>Return Requisition Lines</p> <p>* Indicates required field</p> <p>* Reason</p>  |
| 5. | <p>Enter the reason for the return in the Reason field.</p> <p>Return Requisition Lines</p> <p>* Indicates required field</p> <p>* Reason</p>  |
| 6. | <p>Click the Apply button.</p> <p>Cancel Apply</p> |



The screenshot shows the Oracle Purchasing Demand Workbench interface. At the top, a yellow banner displays a **Confirmation** message: "Requisition lines have been returned." Below this, the "Demand Workbench" section is visible, including a "Document Builder" panel on the right and a table of requisition lines. The table has columns for OU, Requisition, Info, Item/Job, IDV Line, Qty, and Unit. The requisition lines listed are:

| OU | Requisition | Info | Item/Job | IDV Line | Qty | Unit |
|-----|------------------------|------|-----------|----------|-----|------|
| UCG | 11503PR210000001, 0001 | | Test 12 | | 50 | Each |
| UCG | 11503PR210000001, 0002 | | Test 12 | | 50 | Each |
| UCG | 11503CC210000041, 0001 | | test test | | 16 | Each |
| UCG | 11503CC210000038, 0001 | | test test | | 3 | Each |
| UCG | 11503CC210000037, 0001 | | test test | | 5 | Each |

| Step | Action |
|------|--|
| 7. | <p>The Demand Workbench page redisplay with a Confirmation message at the top of the page.</p> <p>Note: 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.</p> |
| 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.

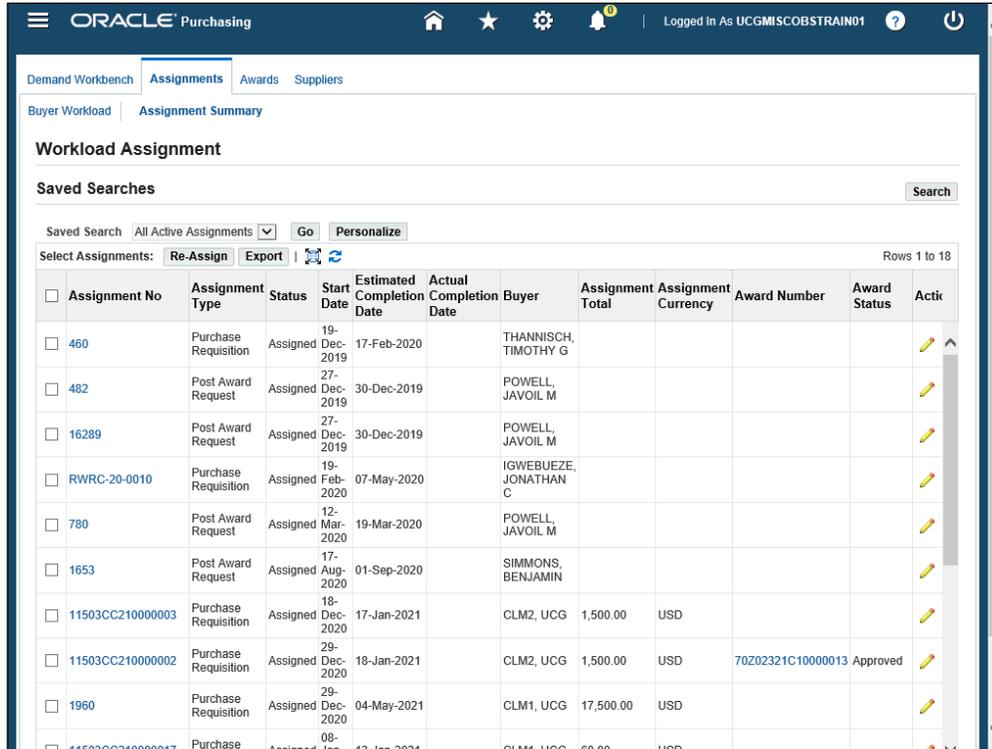
3.1 Searching for Workload Assignments

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.

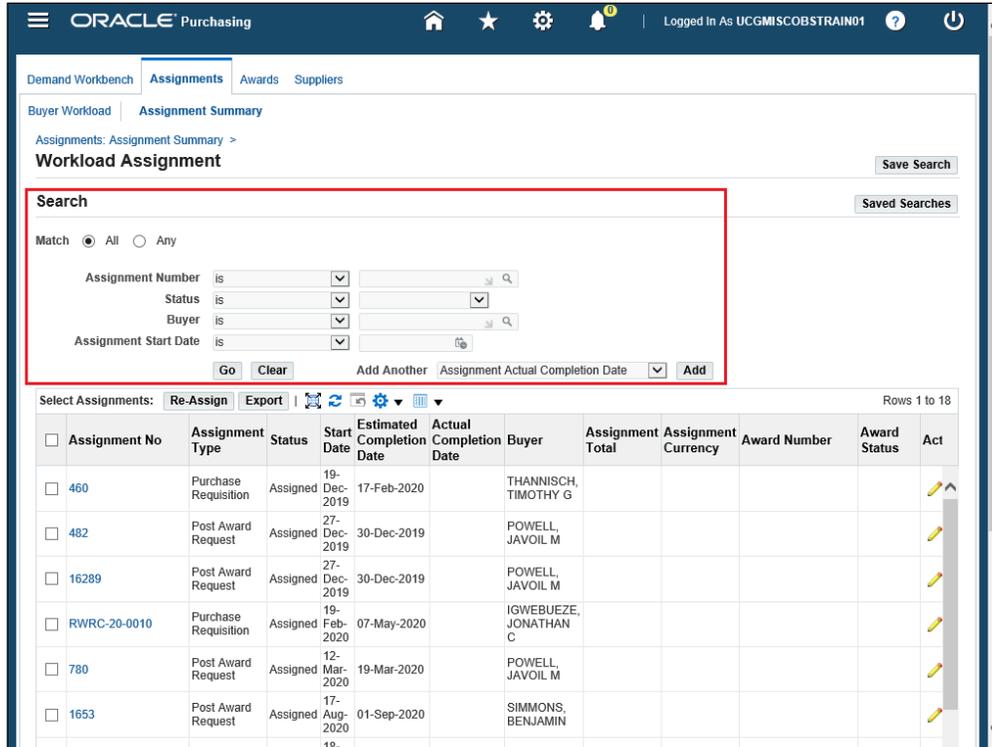
Scenario: You are a CLM user responsible for managing Workload Assignments. For this scenario, perform a search for Workload Assignments assigned to a specific Buyer.



The screenshot shows the Oracle Purchasing interface. At the top, it says 'ORACLE Purchasing' and 'Logged In As UCGMISCOBSTRAIN01'. Below the navigation tabs, the 'Workload Assignment' section is active. A 'Search' button is visible in the top right of the assignment list area. The table below shows a list of assignments with columns for Assignment No, Assignment Type, Status, Start Date, Estimated Completion Date, Actual Completion Date, Buyer, Assignment Total, Assignment Currency, Award Number, Award Status, and Action.

| Assignment No | Assignment Type | Status | Start Date | Estimated Completion Date | Actual Completion Date | Buyer | Assignment Total | Assignment Currency | Award Number | Award Status | Action |
|-------------------|----------------------|----------|-------------|---------------------------|------------------------|-----------------------|------------------|---------------------|-------------------|--------------|--------|
| 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 | | | | | |
| 16289 | Post Award Request | Assigned | 27-Dec-2019 | 30-Dec-2019 | | POWELL, JAVOIL M | | | | | |
| 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 | | | | | |
| 11503CC210000003 | Purchase Requisition | Assigned | 18-Dec-2020 | 17-Jan-2021 | | CLM2, UCG | 1,500.00 | USD | | | |
| 11503CC210000002 | Purchase Requisition | Assigned | 29-Dec-2020 | 18-Jan-2021 | | CLM2, UCG | 1,500.00 | USD | 70202321C10000013 | Approved | |
| 1960 | Purchase Requisition | Assigned | 29-Dec-2020 | 04-May-2021 | | CLM1, UCG | 17,500.00 | USD | | | |
| 11503CC2100000017 | Purchase Requisition | Assigned | 08-Jan-2021 | 12-Jan-2021 | | CLM4, UCG | 60.00 | USD | | | |

| 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.  |



| Assignment No | Assignment Type | Status | Start Date | Estimated Completion Date | Actual Completion Date | Buyer | Assignment Total | Assignment Currency | Award Number | Award Status | Act |
|---------------|----------------------|----------|-------------|---------------------------|------------------------|-----------------------|------------------|---------------------|--------------|--------------|-----|
| 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 | | | | | |
| 16289 | Post Award Request | Assigned | 27-Dec-2019 | 30-Dec-2019 | | POWELL, JAVOIL M | | | | | |
| 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 | | | | | |

| Step | Action |
|------|---|
| 3. | <p>The Search 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.</p> <p>This lesson demonstrates the steps used to perform a search for all Workload Assignments assigned to a specific Buyer.</p> |
| 4. | <p>Click in the Buyer field.</p>  |
| 5. | <p>Enter the applicable information into the Buyer field or use the Search and Select icon to search for and select the applicable Buyer.</p>  |

ORACLE Purchasing | Logged In As UCGMISCOBSTRAIN01

Demand Workbench | **Assignments** | Awards | Suppliers

Buyer Workload | **Assignment Summary**

Assignments: Assignment Summary >

Workload Assignment

Save Search

Search Saved Searches

Match All Any

Assignment Number is

Status is

Buyer is MISCOBS, UCG

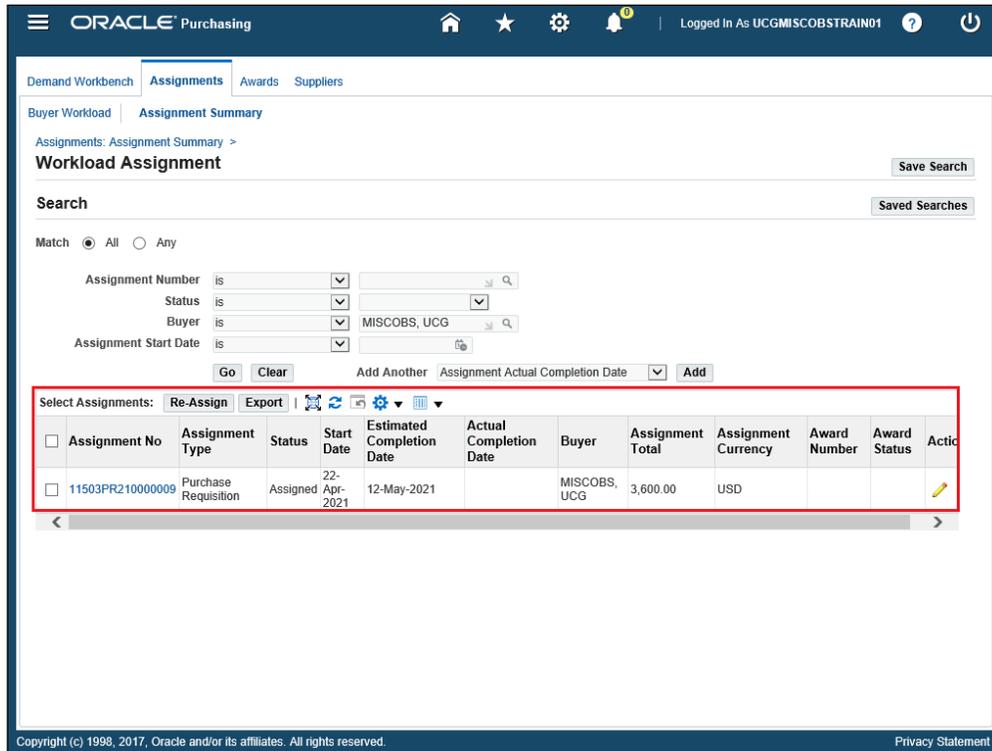
Assignment Start Date is

Assignment Actual Completion Date

Select Assignments: Rows 1 to 18

| <input type="checkbox"/> | Assignment No | Assignment Type | Status | Start Date | Estimated Completion Date | Actual Completion Date | Buyer | Assignment Total | Assignment Currency | Award Number | Award Status | Act |
|--------------------------|---------------|----------------------|----------|-------------|---------------------------|------------------------|-----------------------|------------------|---------------------|--------------|--------------|-----|
| <input type="checkbox"/> | 460 | Purchase Requisition | Assigned | 19-Dec-2019 | 17-Feb-2020 | | THANNISCH, TIMOTHY G | | | | | |
| <input type="checkbox"/> | 482 | Post Award Request | Assigned | 27-Dec-2019 | 30-Dec-2019 | | POWELL, JAVOIL M | | | | | |
| <input type="checkbox"/> | 16289 | Post Award Request | Assigned | 27-Dec-2019 | 30-Dec-2019 | | POWELL, JAVOIL M | | | | | |
| <input type="checkbox"/> | RWRC-20-0010 | Purchase Requisition | Assigned | 19-Feb-2020 | 07-May-2020 | | IGWEBUEZE, JONATHAN C | | | | | |
| <input type="checkbox"/> | 780 | Post Award Request | Assigned | 12-Mar-2020 | 19-Mar-2020 | | POWELL, JAVOIL M | | | | | |
| <input type="checkbox"/> | 1653 | Post Award Request | Assigned | 17-Aug-2020 | 01-Sep-2020 | | SIMMONS, BENJAMIN | | | | | |

| Step | Action |
|------|---|
| 6. | Click the Go button to initiate the search.  <input type="button" value="Clear"/> <input type="button" value="Add Another"/> <input type="text"/> Assignment Actual Completion Date <input type="button" value="Add"/> |



The screenshot shows the Oracle Purchasing 'Workload Assignment' page. It includes a search section with filters for Assignment Number, Status, Buyer (set to MISCOBS, UCG), and Assignment Start Date. Below the search is a table of assignments. One assignment is highlighted with a red box:

| Assignment No | Assignment Type | Status | Start Date | Estimated Completion Date | Actual Completion Date | Buyer | Assignment Total | Assignment Currency | Award Number | Award Status | Actions |
|------------------|----------------------|----------|-------------|---------------------------|------------------------|--------------|------------------|---------------------|--------------|--------------|---------|
| 11503PR210000009 | Purchase Requisition | Assigned | 22-Apr-2021 | 12-May-2021 | | MISCOBS, UCG | 3,600.00 | USD | | | |

| Step | Action |
|------|---|
| 7. | <p>The search results display.</p> <p>Users can access the Workload Assignment two different ways depending on the status of the Assignment:</p> <ul style="list-style-type: none"> - Click on the Assignment Number link to view the Workload Assignment details in read-only mode - Click the Update icon (pencil icon in the Actions column) to access the Workload Assignment details directly in edit mode. |
| 8. | End of Procedure. |

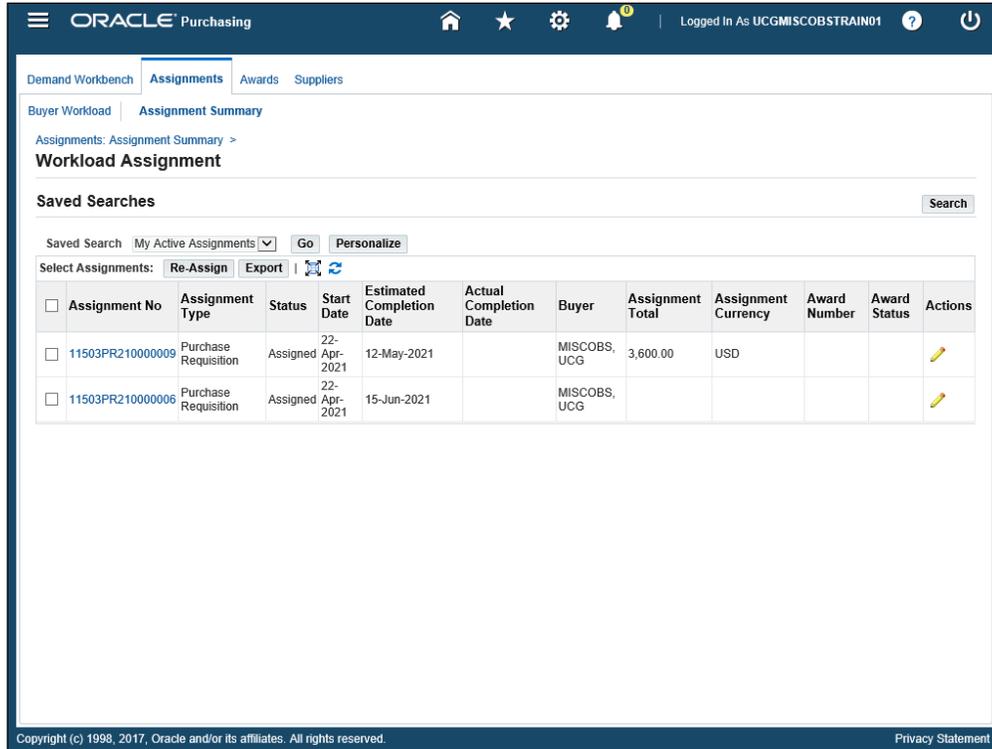
3.2 Completing Workload Assignments

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 **cannot** 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.



The screenshot shows the Oracle Purchasing interface. At the top, there's a navigation bar with 'ORACLE Purchasing' and user information 'Logged In As UCGMISCOBSTRAIN01'. Below this, there are tabs for 'Demand Workbench', 'Assignments', 'Awards', and 'Suppliers'. The 'Assignments' tab is active, showing 'Buyer Workload' and 'Assignment Summary'. The main heading is 'Workload Assignment'. Below this, there's a 'Saved Searches' section with a 'Search' button. A dropdown menu shows 'My Active Assignments' selected. Below the dropdown are buttons for 'Go' and 'Personalize'. There's also a 'Select Assignments:' section with buttons for 'Re-Assign', 'Export', and a refresh icon. The main content is a table with the following data:

| <input type="checkbox"/> | Assignment No | Assignment Type | Status | Start Date | Estimated Completion Date | Actual Completion Date | Buyer | Assignment Total | Assignment Currency | Award Number | Award Status | Actions |
|--------------------------|------------------|----------------------|----------|-------------|---------------------------|------------------------|--------------|------------------|---------------------|--------------|--------------|---------|
| <input type="checkbox"/> | 11503PR210000009 | Purchase Requisition | Assigned | 22-Apr-2021 | 12-May-2021 | | MISCOBS, UCG | 3,600.00 | USD | | | |
| <input type="checkbox"/> | 11503PR210000006 | Purchase Requisition | Assigned | 22-Apr-2021 | 15-Jun-2021 | | MISCOBS, UCG | | | | | |

At the bottom of the screenshot, there is a copyright notice: 'Copyright (c) 1998, 2017, Oracle and/or its affiliates. All rights reserved.' and a 'Privacy Statement' link.

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

| Step | Action |
|------|--|
| 2. | <p>Completing Workload Assignments:</p> <p>Manually Complete a Workload Assignment:</p> <p>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.</p> <p>Automatically Complete Workload Assignments:</p> <p>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.</p> <p>This lesson demonstrates the steps for manually completing a Workload Assignment.</p> |
| 3. | <p>Click the Update (pencil icon in the Actions column) icon for the applicable Workload Assignment.</p> <div data-bbox="315 1163 420 1356" style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Actions</p>  </div> |

ORACLE Purchasing | Logged In As UCGMISCOBSTRAIN01

Demand Workbench | **Assignments** | Awards | Suppliers

Buyer Workload | **Assignment Summary**

Assignments: Assignment Summary > Workload Assignment >

Update Workload Assignment

View Buyer Workload | Cancel | Apply

Workload Assignment Number: 11503PR210000009
 Buyer: MISCOBS, UCG
 * Start Date: 22-Apr-2021 15:17:53
 Status: Assigned

* Estimated Duration (Days): 20
 Assignment Type: Purchase Requisition
 Estimated Completion Date: 12-May-2021 15:17:53
 Actual Completion Date:
 Assignment Milestone Template: USCG_MicroPurchase LessThan 10K

Action

Action: * Reason:

Milestones

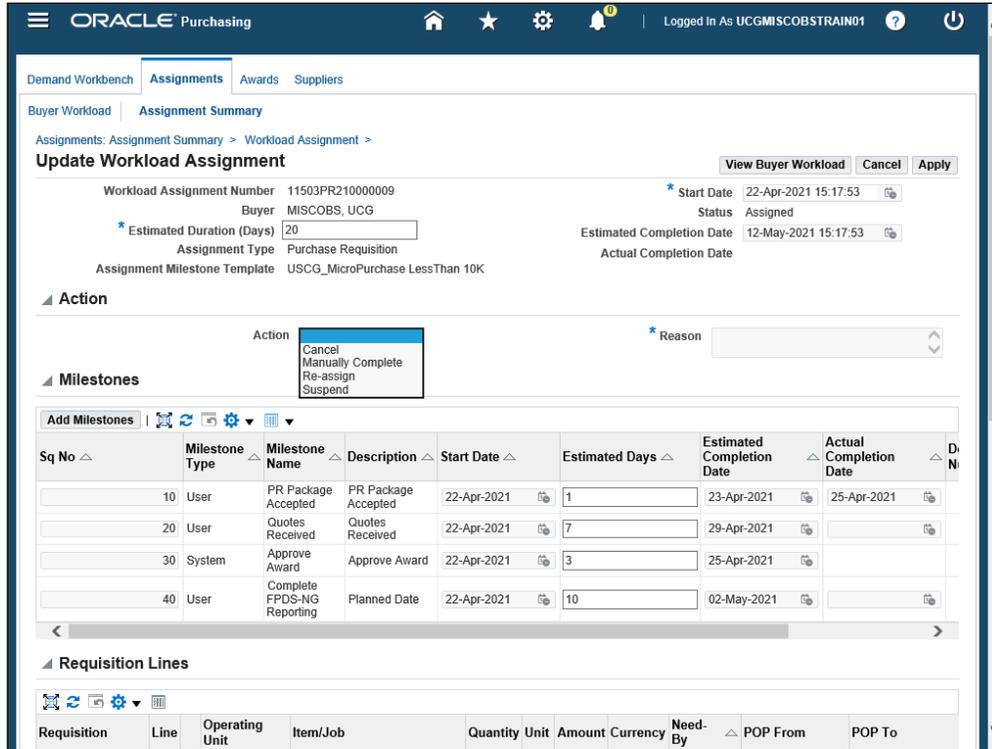
Add Milestones |      

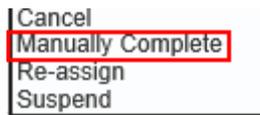
| Sq No | Milestone Type | Milestone Name | Description | Start Date | Estimated Days | Estimated Completion Date | Actual Completion Date | D.N |
|-------|----------------|----------------------------|---------------------|-------------|----------------|---------------------------|------------------------|-----|
| 10 | User | PR Package Accepted | PR Package Accepted | 22-Apr-2021 | 1 | 23-Apr-2021 | 25-Apr-2021 | |
| 20 | User | Quotes Received | Quotes Received | 22-Apr-2021 | 7 | 29-Apr-2021 | | |
| 30 | System | Approve Award | Approve Award | 22-Apr-2021 | 3 | 25-Apr-2021 | | |
| 40 | User | Complete FPDS-NG Reporting | Planned Date | 22-Apr-2021 | 10 | 02-May-2021 | | |

Requisition Lines

| Requisition | Line | Operating Unit | Item/Job | Quantity | Unit | Amount | Currency | Need-By | POP From | POP To |
|-------------|------|----------------|----------|----------|------|--------|----------|---------|----------|--------|
|-------------|------|----------------|----------|----------|------|--------|----------|---------|----------|--------|

| Step | Action |
|------|--|
| 4. | <p>The Update Workload Assignment page displays.</p> <p>Click the Action dropdown button.</p> <p>Action <input type="text"/> </p> |



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

ORACLE Purchasing | Logged In As UCGMISCOBSTRAIN01

Demand Workbench | **Assignments** | Awards | Suppliers

Buyer Workload | **Assignment Summary**

Assignments: Assignment Summary > Workload Assignment >

Update Workload Assignment

Workload Assignment Number: 11503PR21000009
 Buyer: MISCOBS, UCG
 * Start Date: 22-Apr-2021 15:17:53
 Status: Assigned
 * Estimated Duration (Days): 20
 Assignment Type: Purchase Requisition
 Estimated Completion Date: 12-May-2021 15:17:53
 Actual Completion Date:
 Assignment Milestone Template: USCG_MicroPurchase LessThan 10K

Action

Action: Manually Complete | * Reason: Complete

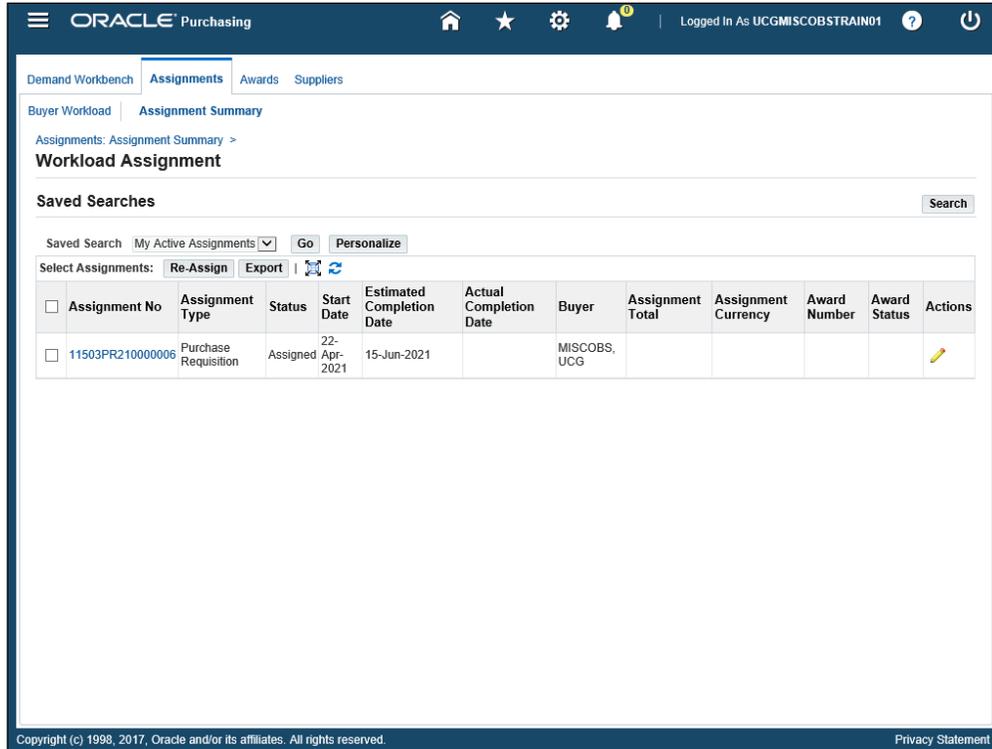
Milestones

| Sq No | Milestone Type | Milestone Name | Description | Start Date | Estimated Days | Estimated Completion Date | Actual Completion Date |
|-------|----------------|----------------------------|---------------------|-------------|----------------|---------------------------|------------------------|
| 10 | User | PR Package Accepted | PR Package Accepted | 22-Apr-2021 | 1 | 23-Apr-2021 | 25-Apr-2021 |
| 20 | User | Quotes Received | Quotes Received | 22-Apr-2021 | 7 | 29-Apr-2021 | |
| 30 | System | Approve Award | Approve Award | 22-Apr-2021 | 3 | 25-Apr-2021 | |
| 40 | User | Complete FPDS-NG Reporting | Planned Date | 22-Apr-2021 | 10 | 02-May-2021 | |

Requisition Lines

| Requisition | Line | Operating Unit | Item/Job | Quantity | Unit | Amount | Currency | Need-By | POP From | POP To |
|-------------|------|----------------|----------|----------|------|--------|----------|---------|----------|--------|
|-------------|------|----------------|----------|----------|------|--------|----------|---------|----------|--------|

| Step | Action |
|------|---|
| 8. | Click the Apply button to save and apply this change. <input type="button" value="View Buyer Workload"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> |



The screenshot shows the Oracle Purchasing interface. At the top, it says 'ORACLE Purchasing' and 'Logged In As UCGMISCOBSTRAIN01'. The main navigation includes 'Demand Workbench', 'Assignments', 'Awards', and 'Suppliers'. Under 'Assignments', there are sub-tabs for 'Buyer Workload' and 'Assignment Summary'. The page title is 'Workload Assignment'. Below this, there is a 'Saved Searches' section with a search button. A table titled 'My Active Assignments' is displayed with the following data:

| Assignment No | Assignment Type | Status | Start Date | Estimated Completion Date | Actual Completion Date | Buyer | Assignment Total | Assignment Currency | Award Number | Award Status | Actions |
|------------------|----------------------|----------|-------------|---------------------------|------------------------|--------------|------------------|---------------------|--------------|--------------|---|
| 11503PR210000006 | Purchase Requisition | Assigned | 22-Apr-2021 | 15-Jun-2021 | | MISCOBS, UCG | | | | |  |

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| Step | Action |
|------|--|
| 9. | The Workload Assignment page redisplay. The completed Workload Assignment is no longer displayed in the Workload Assignments table as an active Assignment. |
| 10. | End of Procedure. |