

## **Work with AB Requests**

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The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

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## Work with AB Requests

### Work with AB Requests - Overview

Address Book Requesters have the ability to review and update their Address Book Requests if the request has not already been approved or processed by the AS State Accounting, Address Book Team.

A Requester will receive an e-mail notification from the AB Team that action is required for specific Address Book Requests:

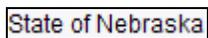
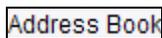
- Status B = Banking Info Required - an existing Address Book record has incorrect or obsolete Banking Information or there is now Banking (ACH) Information for a record that requires ACH payments
- Status C = Change Processed Record - an existing Address Book record has incorrect information and requires an update
- Status D = Data Entry Review Required - an Address Book Request was submitted, but information or documentation was not included in the request

### Work with AB Requests

#### Procedure

In this lesson you will learn how to perform an edit to an Address Book Request.

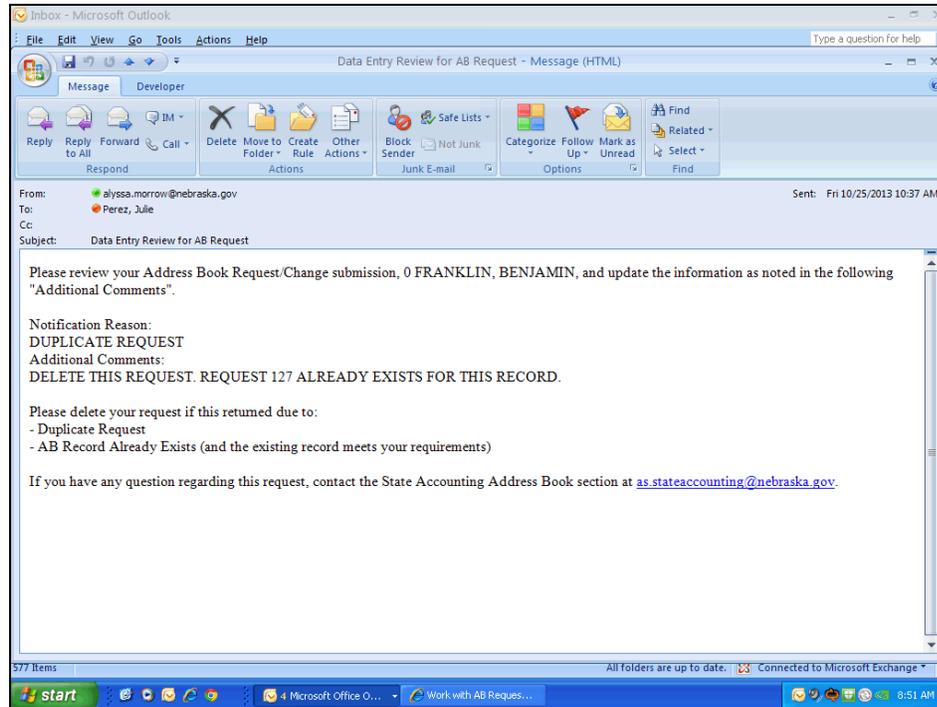
*Note:* This lesson's examples end each time with the "Close" procedure and require you to restart the lesson to select the next example.

Step	Action
1.	Any requests that are submitted by an end user or initiated by the Address Book Team will show up in the Work with AB Requests application. This is the end user's "Personal Request Queue". An end user has the ability to edit a request until the Address Book Team pulls it for processing or has approved the request.  <i>Note:</i> Editing also include submitting any attachments which were omitted during the original request process.
2.	Click the <b>State of Nebraska</b> link. 
3.	Click the <b>Address Book</b> link. 
4.	Click the <b>Work with AB Requests</b> link. 
5.	Click the <b>Find</b> button. 

# Training Guide

## Work with AB Requests

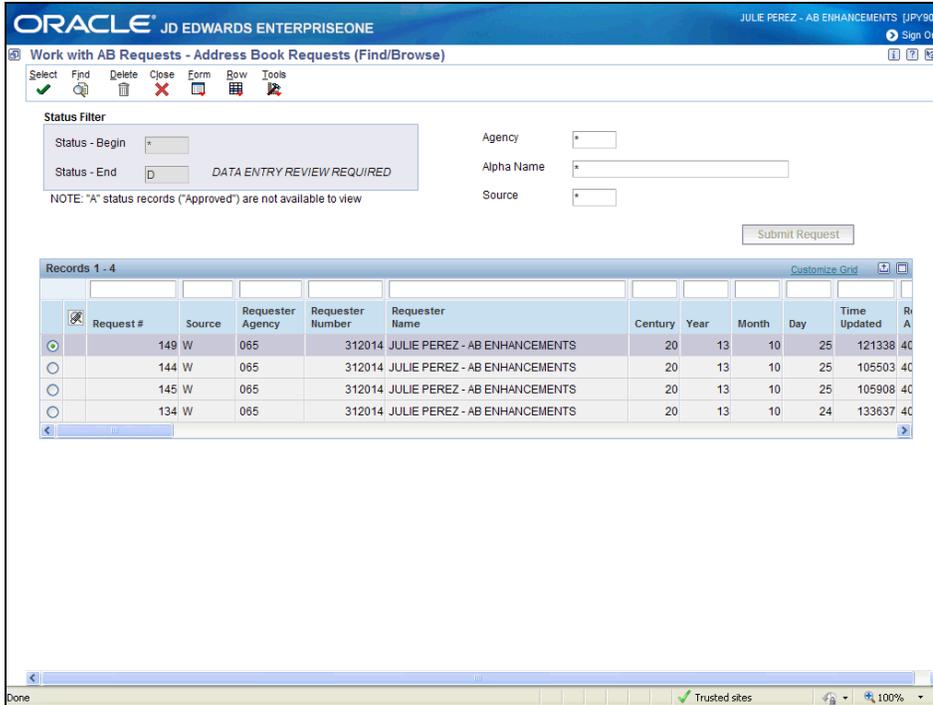
Step	Action
6.	<p><b>Decision:</b> Please make a selection from the options listed below.</p> <ul style="list-style-type: none"> <li>• Update an Address Book Request that has not been processed/reviewed Go to step 7 on page 2</li> <li>• Update an Address Book Request that requires Data Entry Review Go to step 14 on page 3</li> <li>• Update an Address Book Request that requires new ACH Information (e-mail received from AB Team) Go to step 25 on page 7</li> <li>• Update an Address Book Request that requires a change to Address Information (e-mail received from AB Team) Go to step 48 on page 13</li> </ul>
7.	<p>The first record is automatically selected. Click the option.</p> 
8.	<p>Click the <b>Select</b> button.</p> 
9.	<p>Click in the <b>ACH Email</b> field.</p> <input data-bbox="342 936 829 978" type="text" value="ach.company@company.com"/>
10.	<p>Enter the desired information into the <b>ACH Email</b> field.</p>
11.	<p>Click the <b>OK</b> button.</p> 
12.	<p>Click the <b>Close</b> button.</p> 
13.	<p><b>End of Procedure.</b> Remaining steps apply to other paths.</p>



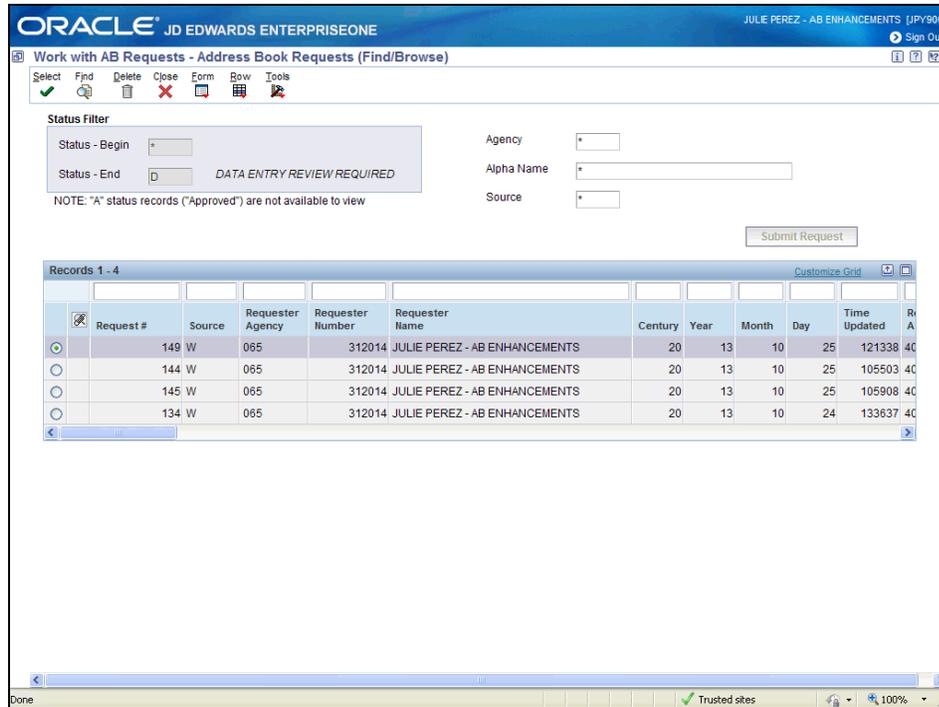
Step	Action
14.	<p><b>Data Entry Review for AB Request</b></p> <p>AS State Accounting Address Book Team may require additional information or attachments to a submitted AB request.</p> <p>If there are questions, a request will be returned to the Requester.</p> <p>The Requester will be notified via e-mail. A record exists in the Requester's "Work with AB Requests" grid.</p> <p>The request will have a <b>Status</b> of "D" indicates "DATA ENTRY REVIEW REQUIRED".</p>

# Training Guide

## Work with AB Requests



Step	Action
15.	Find the record in the grid for with a status of "D" to work with the request that was submitted and returned by the AS State Accounting AB Team.  Click the option. 
16.	Click the <b>Select</b> button. 
17.	<b>Status</b> field  Status D = "DATA ENTRY REVIEW REQUIRED"
18.	Review the information in the <b>Comments</b> field.  Required actions may include: (1) Deletion of Request; (2) inclusion of attachments; (3) revision to formatting; etc.  <i>Note:</i> The information in this field is from the AB Team and provides details regarding the submitted AB Request.
19.	If updates are made to the request, click the <b>OK</b> button.  If no updates are made to the request, click the <b>Cancel</b> button. 



Step	Action
20.	Select the Address record you want to delete. Click the option. 
21.	Click the <b>Delete</b> button. 

# Training Guide

## Work with AB Requests

The screenshot shows the Oracle JD Edwards EnterpriseOne interface. At the top, it says "ORACLE JD EDWARDS ENTERPRISEONE" and "JULIE PEREZ - AB ENHANCEMENTS [JPY900]". Below that is a toolbar with icons for Select, Find, Delete, Close, Form, Row, and Tools. A "Status Filter" section contains fields for Status - Begin, Status - End (with a dropdown set to 'D' and a note "DATA ENTRY REVIEW REQUIRED"), Agency, Alpha Name, and Source. A "Submit Request" button is visible. Below the filter is a table titled "Records 1 - 4" with columns: Request #, Source, Requester Agency, Requester Number, Requester Name, Century, Year, Month, Day, Time Updated, and Requester Agency. A dialog box titled "Message from webpage" is overlaid on the table, asking "Are you sure that you want to delete the selected item?" with "OK" and "Cancel" buttons. The table data is as follows:

Request #	Source	Requester Agency	Requester Number	Requester Name	Century	Year	Month	Day	Time Updated	Requester Agency
144	W	065			20	13	10	25	105503	4C
145	W	065			20	13	10	25	105908	4C
149	W	065			20	13	10	25	121338	4C
134	W	065			20	13	10	24	133637	4C

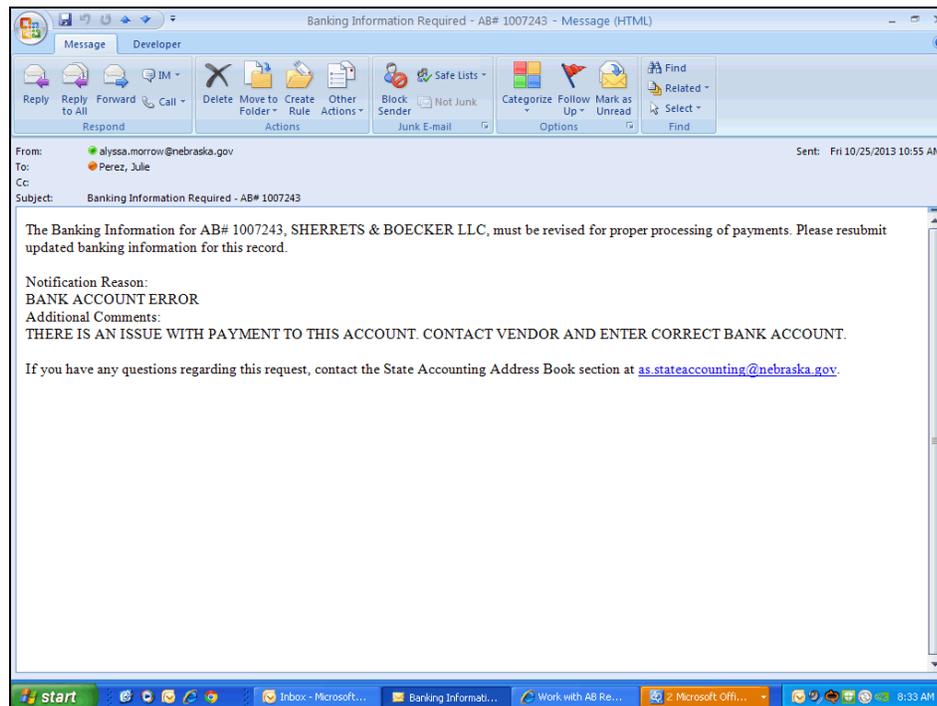
Step	Action
22.	Click the <b>OK</b> button.

OK

The screenshot shows the same Oracle JD Edwards EnterpriseOne interface as the previous one, but the dialog box is closed. The table now shows 3 records. The data is as follows:

Request #	Source	Requester Agency	Requester Number	Requester Name	Century	Year	Month	Day	Time Updated	Requester Agency
144	W	065	312014	JULIE PEREZ - AB ENHANCEMENTS	20	13	10	25	105503	4C
145	W	065	312014	JULIE PEREZ - AB ENHANCEMENTS	20	13	10	25	105908	4C
149	W	065	312014	JULIE PEREZ - AB ENHANCEMENTS	20	13	10	25	121338	4C

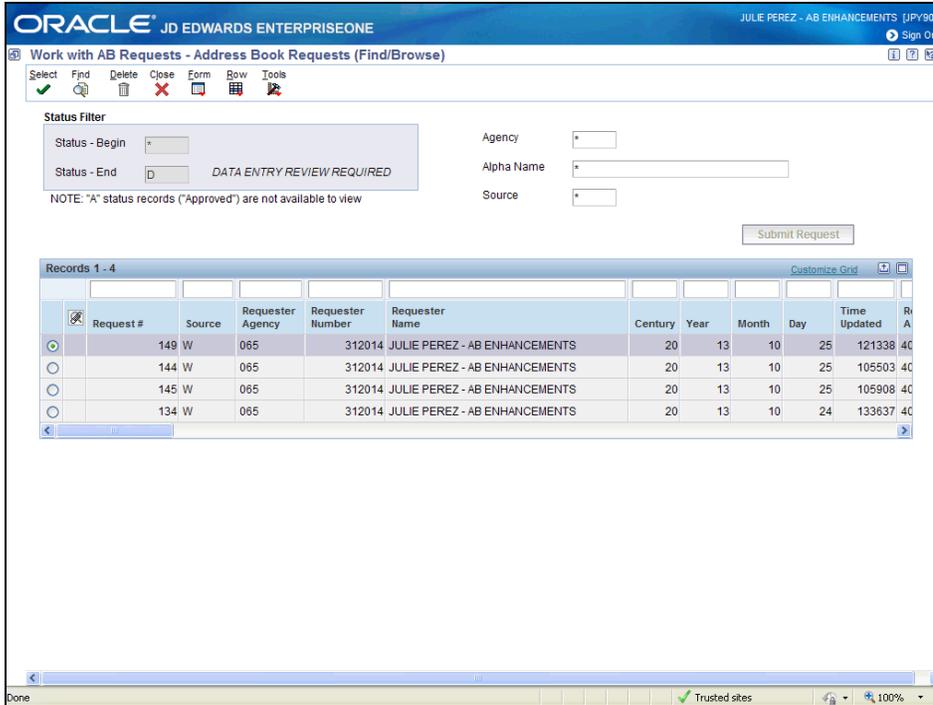
Step	Action
23.	<p><b>NOTE:</b> The request is deleted from the grid.</p> <p>Continue to Work with AB Requests, or click the <b>Close</b> button.</p> 
24.	<p><b>End of Procedure.</b> Remaining steps apply to other paths.</p>



Step	Action
25.	<p><b>Banking Information Required</b></p> <p>AS State Accounting Address Book Team receives notices from the Bank when there are issues processing payments to vendors.</p> <p>AS State Accounting AB Team may initiate a request to the Requester of a processed AB record to update Banking Information.</p> <p>The Requester will be notified via e-mail. A record exists in the Requester's "Work with AB Requests" grid.</p> <p>The request will have a <b>Status</b> of "B" indicates "BANKING INFO REQUIRED".</p>

# Training Guide

## Work with AB Requests

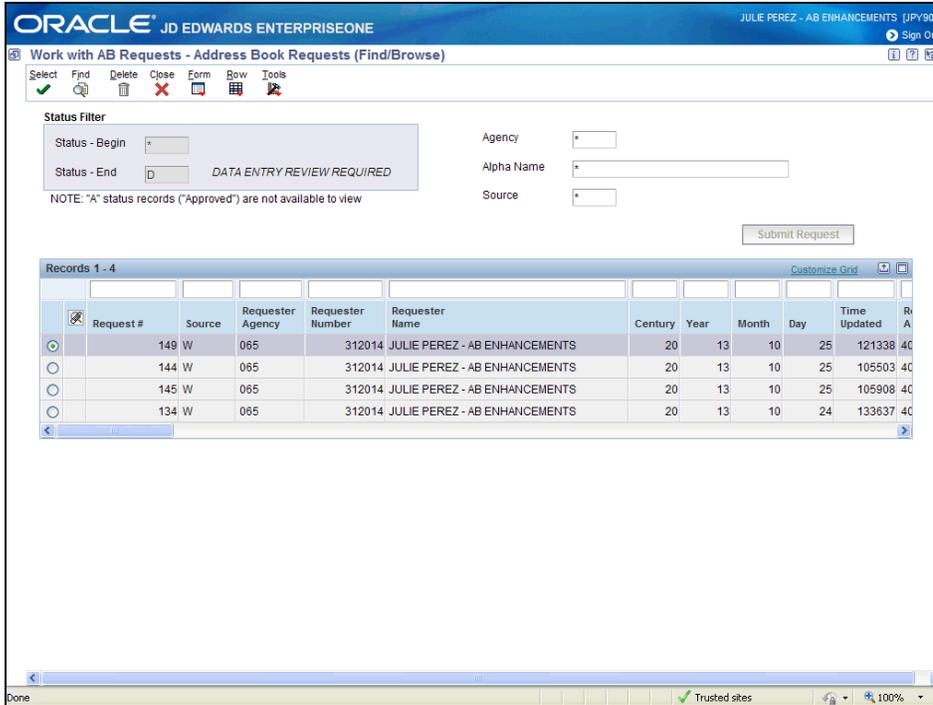


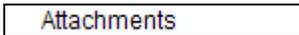
Step	Action
26.	Find the record in the grid for with a status of "B" to work with the request that was initiated by the AS State Accounting AB Team.  Click the option. 
27.	Click the <b>Select</b> button. 
28.	<b>Status</b> field  Status "B" = "BANKING INFO REQUIRED"

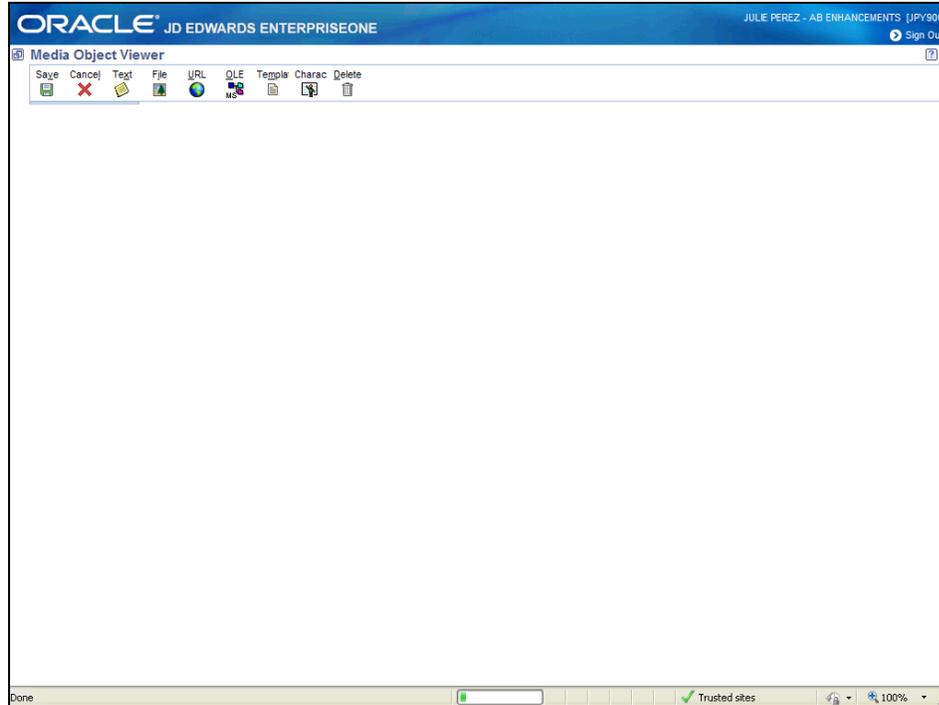
Step	Action
29.	<b>Note:</b> Update all the ACH information as listed on the ACH Enrollment form.
30.	Enter the desired information into the <b>ACH Email</b> field.
31.	Enter the desired information into the <b>Routing #</b> field.
32.	Enter the desired information into the <b>Bank Account #</b> field.
33.	Enter the desired information into the <b>Checking/Savings</b> field.
34.	Enter the desired information into the <b>Comments</b> field.
35.	Click the <b>OK</b> button. 

# Training Guide

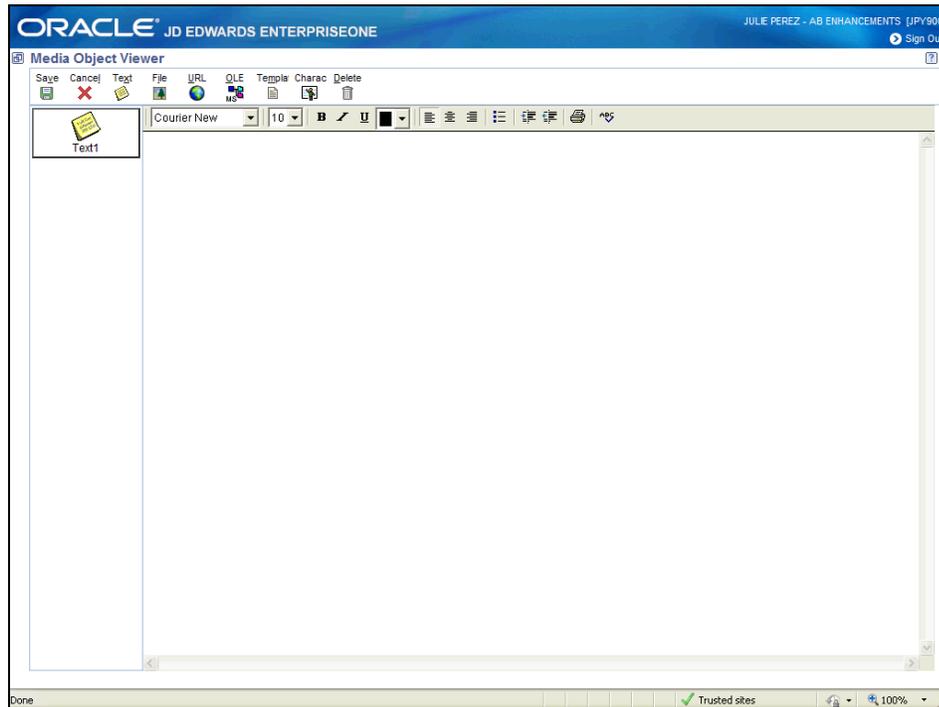
## Work with AB Requests



Step	Action
36.	<b>Note:</b> Attachments should be made when new ACH (Banking) Information is added to an Address Book record.
37.	Click the option. 
38.	Click the <b>Row</b> button. 
39.	Click the <b>Attachments</b> menu. 



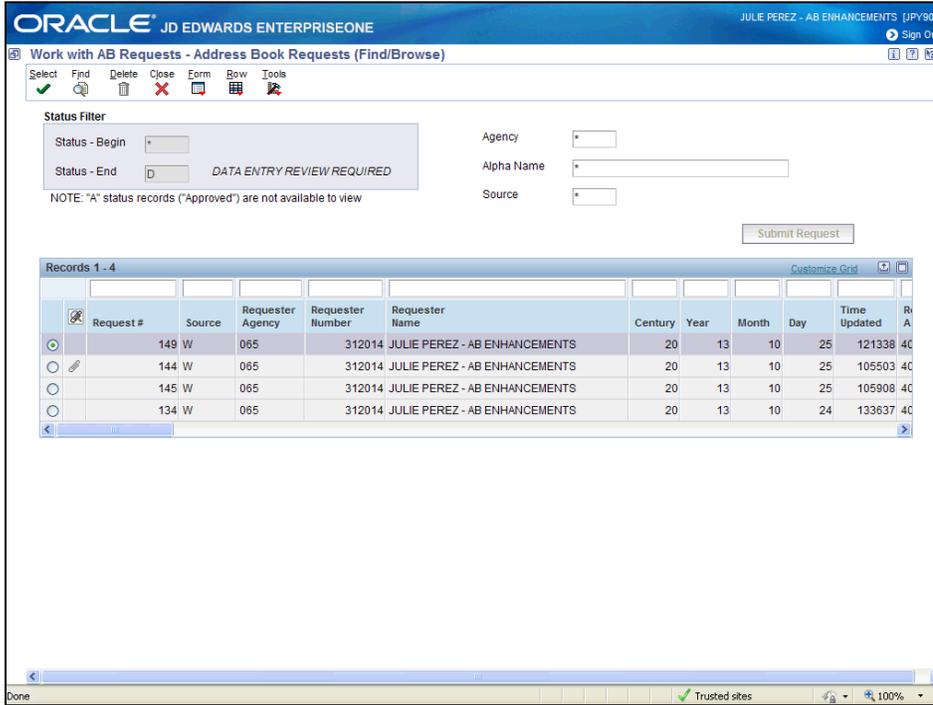
Step	Action
40.	Click the <b>Text</b> button (or <b>File</b> button if attaching documentation). 



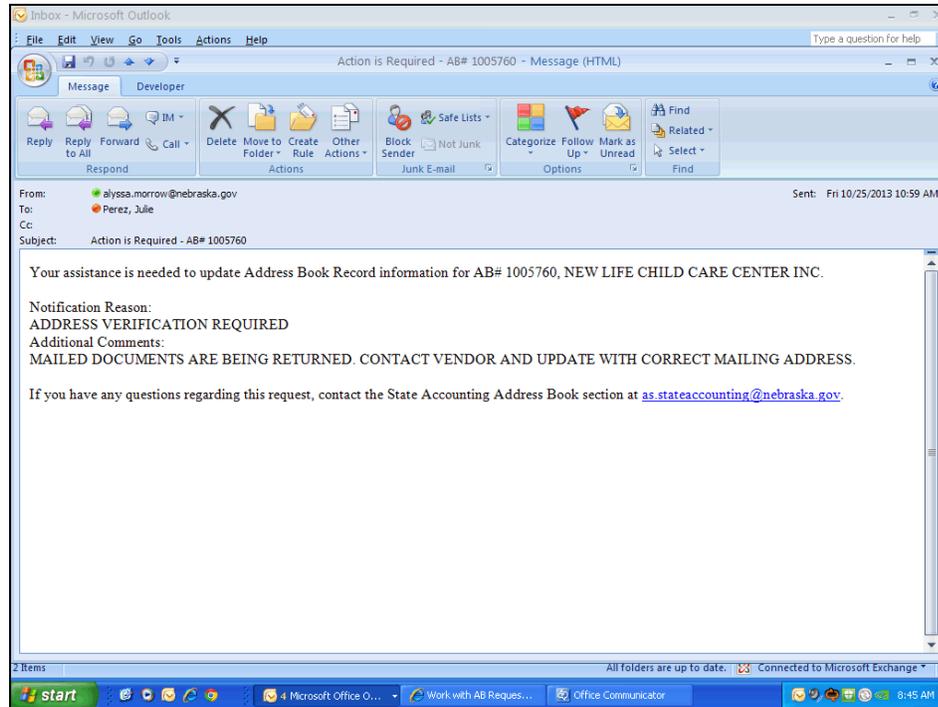
# Training Guide

## Work with AB Requests

Step	Action
41.	Enter the desired information into the field.
42.	Click the <b>Save</b> button. 



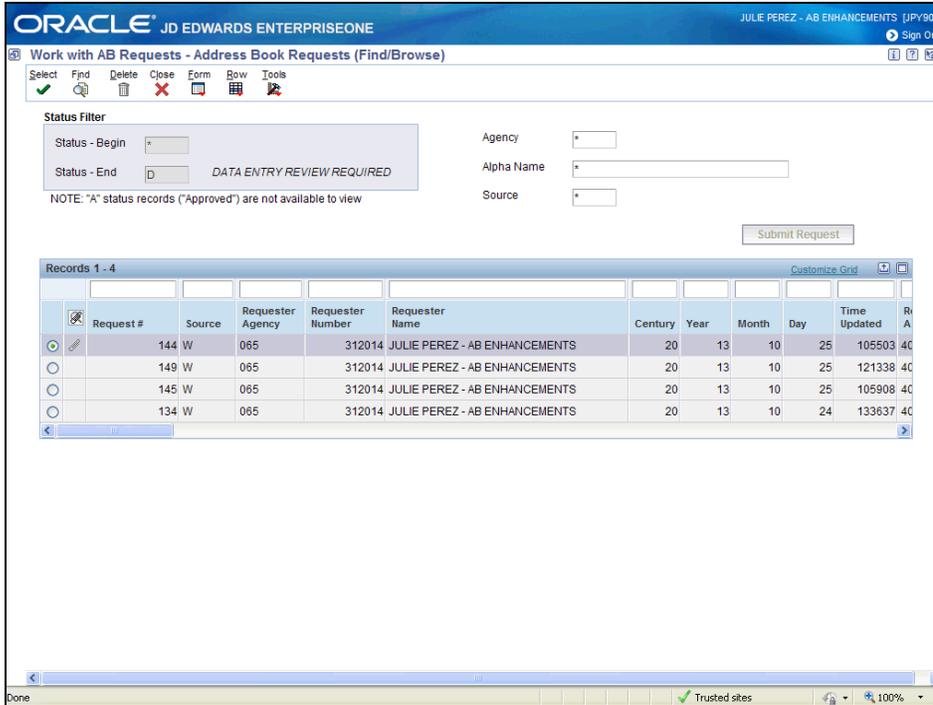
Step	Action
43.	Click the option. 
44.	<b>Note:</b> The <b>Submit Request</b> button click is required on both Status B and Status C requests which were processed request returns initiated by the Address Book Team. The click resubmits the updated request to AS State Accounting, Address Book Team for review and approval.
45.	Click the <b>Submit Request</b> button. 
46.	Click the <b>Close</b> button. 
47.	<b>End of Procedure.</b> Remaining steps apply to other paths.



Step	Action
48.	<p><b>Action is Required</b></p> <p>AS State Accounting Address Book Team receives information regarding vendors that may require an update to the Address Book record.</p> <p>AS State Accounting AB Team may initiate a request to the Requester of a processed AB record to assist with updating information.</p> <p>The Requester will be notified via e-mail. A record exists in the Requester's "Work with AB Requests" grid.</p> <p>The request will have a <b>Status</b> of "C" indicates "CHANGE PROCESSED RECORD".</p>

# Training Guide

## Work with AB Requests

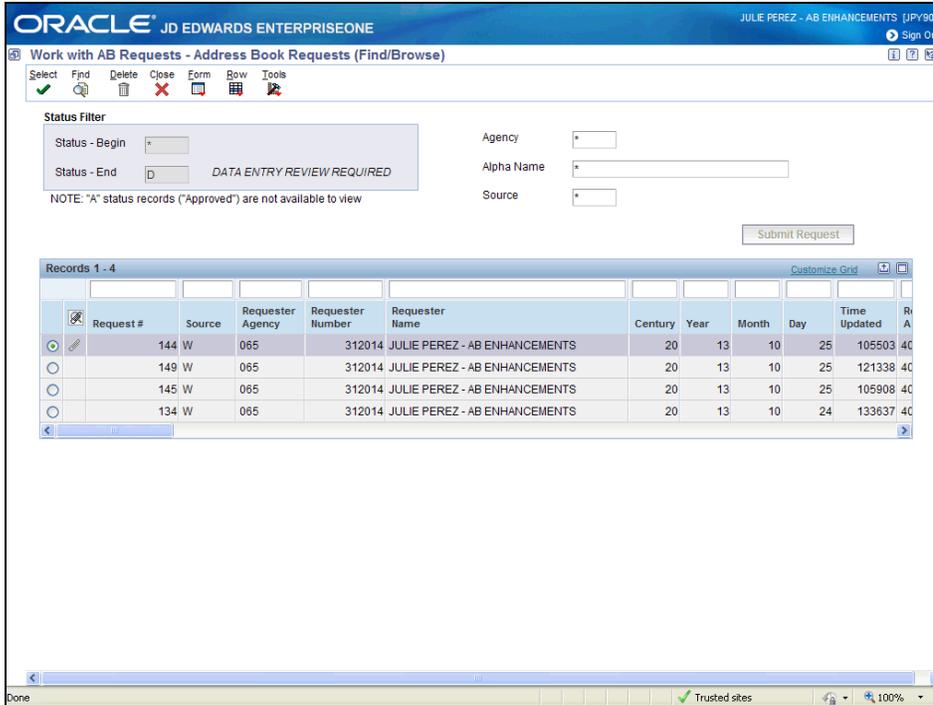


Step	Action
49.	Find the record in the grid for with a status of "C" to work with the request that was initiated by the AS State Accounting AB Team.  Click the option. 
50.	Click the <b>Select</b> button. 
51.	<b>Status</b> field  Status of "C" indicates "CHANGE PROCESSED RECORD"

Step	Action
52.	Update information as required.
53.	Provide information to the Address Book Team regarding updates/changes using the <b>Comments</b> field.
54.	Click the <b>OK</b> button. 

# Training Guide

## Work with AB Requests



Step	Action
55.	<p><b>Note:</b> Select the record to be submitted. This will not always be the record at the top of the grid.</p> <p>Click the option.</p> 
56.	<p><b>Note:</b> The <b>Submit Request</b> button click is required on both Status B and Status C requests which were processed request returns initiated by the Address Book Team. The click resubmits the updated request to AS State Accounting, Address Book Team for review and approval.</p>
57.	<p>Click the <b>Submit Request</b> button.</p> 
58.	<p>Click the <b>Close</b> button.</p> 
59.	<p><b>End of Procedure.</b></p>