

State, Local & K12 Cloud Customer Community Group

26 A/B/C Updates

Colin Narod

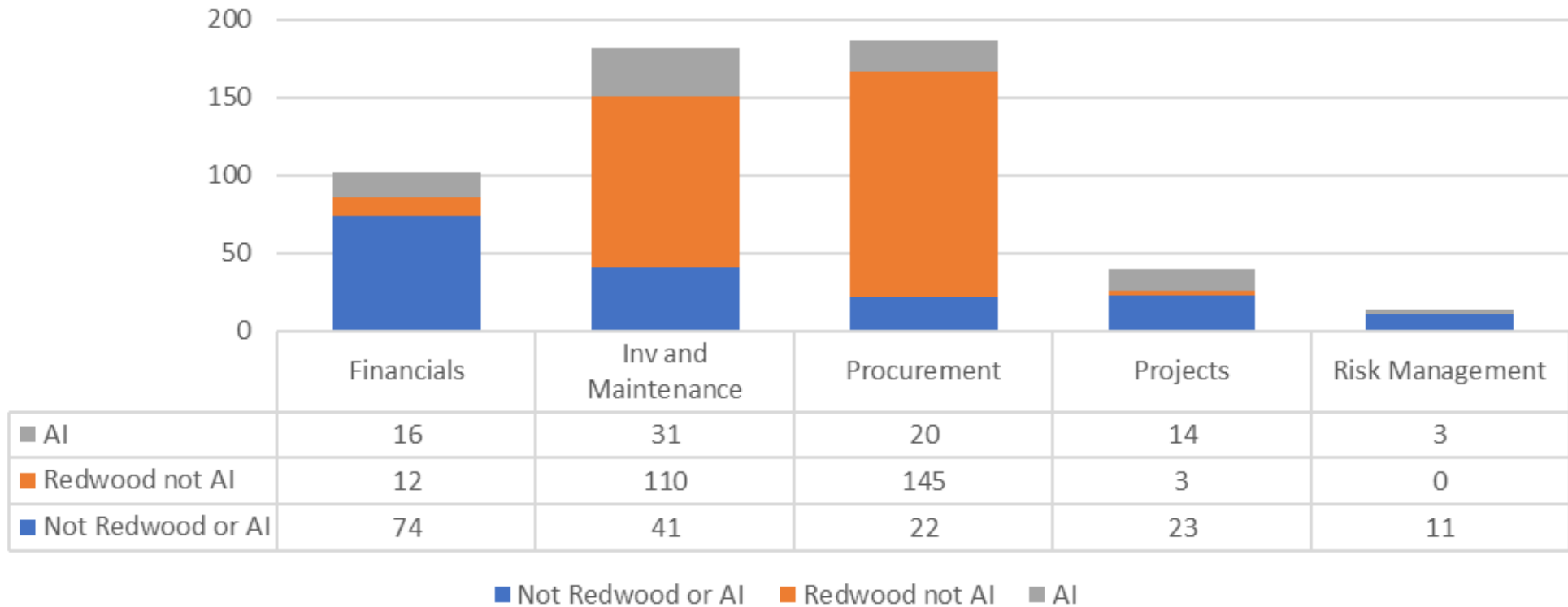
June 24, 2026



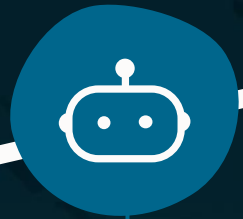
ERP Feature Summary

Features by Release	26A	26B	26C	All
Financials	33	40	29	102
Inv and Maintenance	67	62	53	182
Procurements	70	60	57	187
Projects	12	9	19	40
Risk Management	8	2	4	14
Grand Total	190	173	162	525

Features by Category 26 A+B+C



Oracle AI in Fusion Applications



AI agents
Hundreds of
Oracle-built AI
agents and
counting



AI Agent
Studio
Customer-built
AI agents



AI
Workflows



AI Agent
Marketplace
Partner-built
AI agents



What's
next

What is an *Agentic App*?

New agent patterns supported

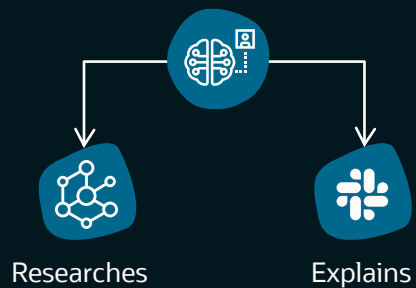
From single agents → to agent teams → agentic systems

AI Agents

Goal-based execution

Uses reasoning and planning

Ex: Explain impact of customer return scenarios and policies

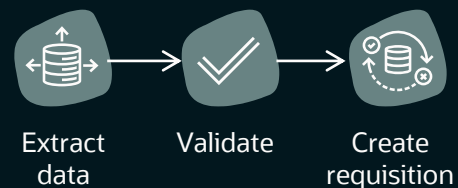


AI Workflows

Logic-based automation

Uses nodes: LLM, loop, if/then, and business object function

Ex: mitigate shipping risk and expedite order execution

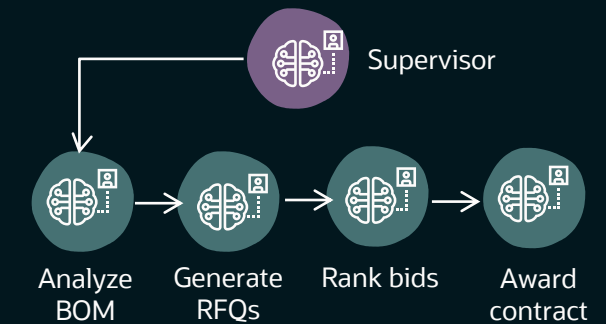


Agentic Apps New

Composable workspaces

Orchestrates specialized agents across roles, data, and systems to complete end-to-end outcomes

Ex: Coordinate engineering and sourcing decisions



Introducing agentic applications

Driven by outcomes

based on specific business objectives
(i.e., close the books faster, reduce attrition)

Proactive not passive

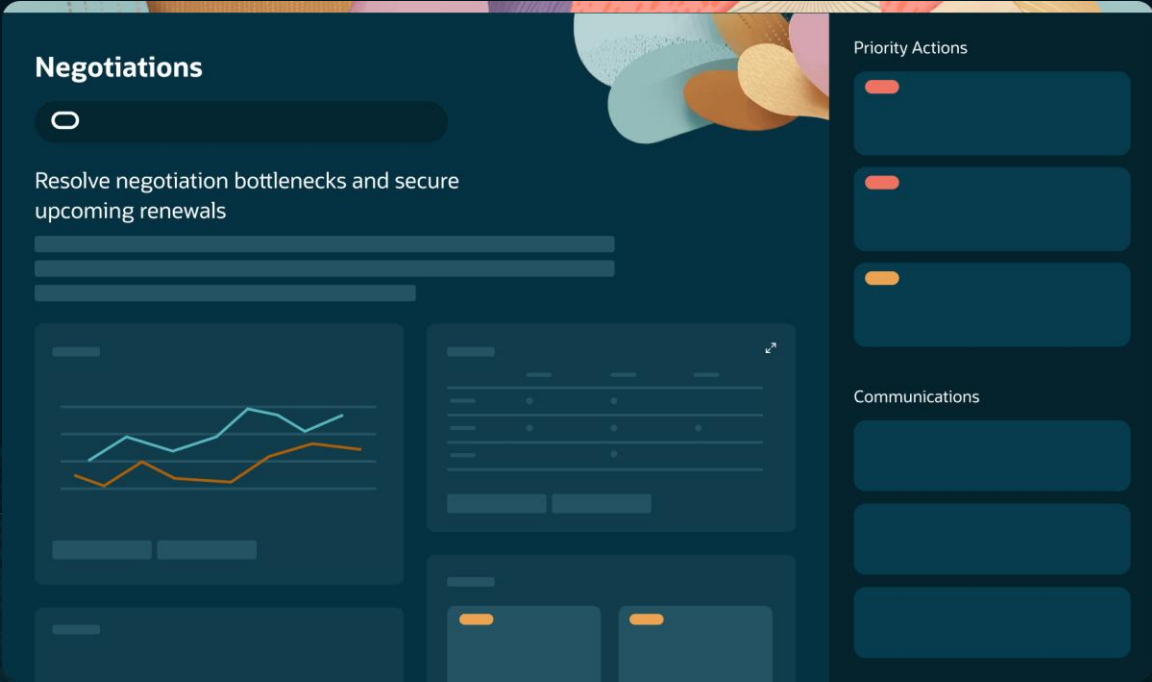
apps that continuously reason and
share context to achieve objectives

Built for enterprise execution

within governance, security, and approval
frameworks and full auditability

Powered by teams of agents

with defined roles (i.e., analysis, decisioning,
execution, collaboration) and expertise



Demonstration

Today

- Financials
- Procurement for Self-Service
- Procurement
- Projects & Grants

Financials



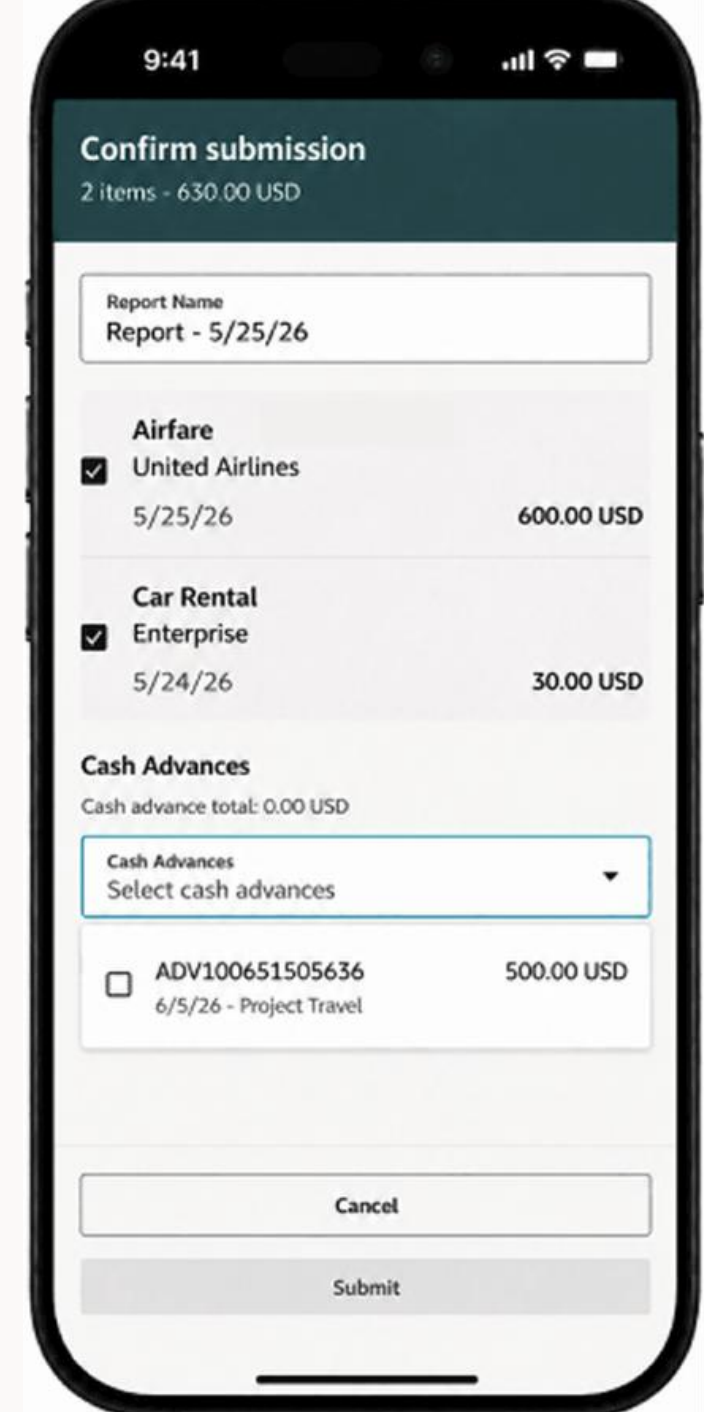
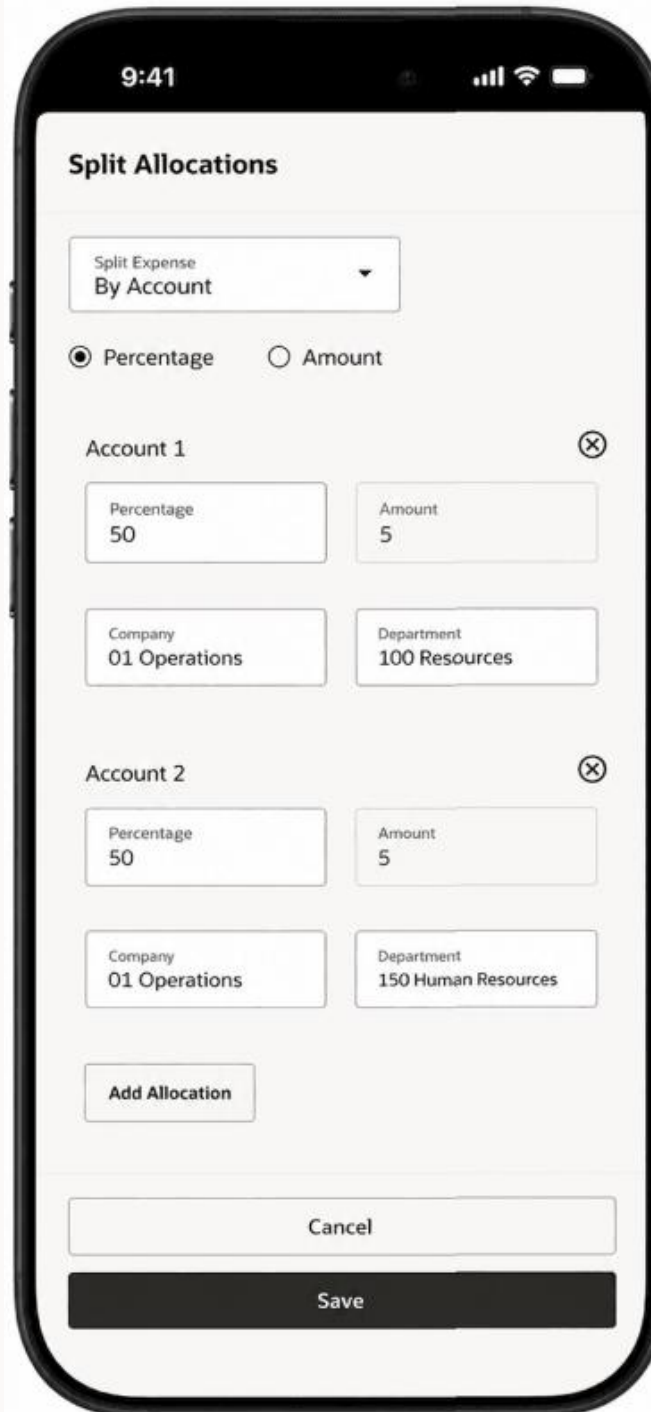
26C: Expenses Agent

[Expenses Agent for Cost Allocations and Additional Information](#)

Use the Expenses Agent to split expenses across cost centers or projects and tasks.

[Expenses Agent for Cash Advance Application](#)

Use the Expenses Agent to apply cash advances manually when submitting expense reports.

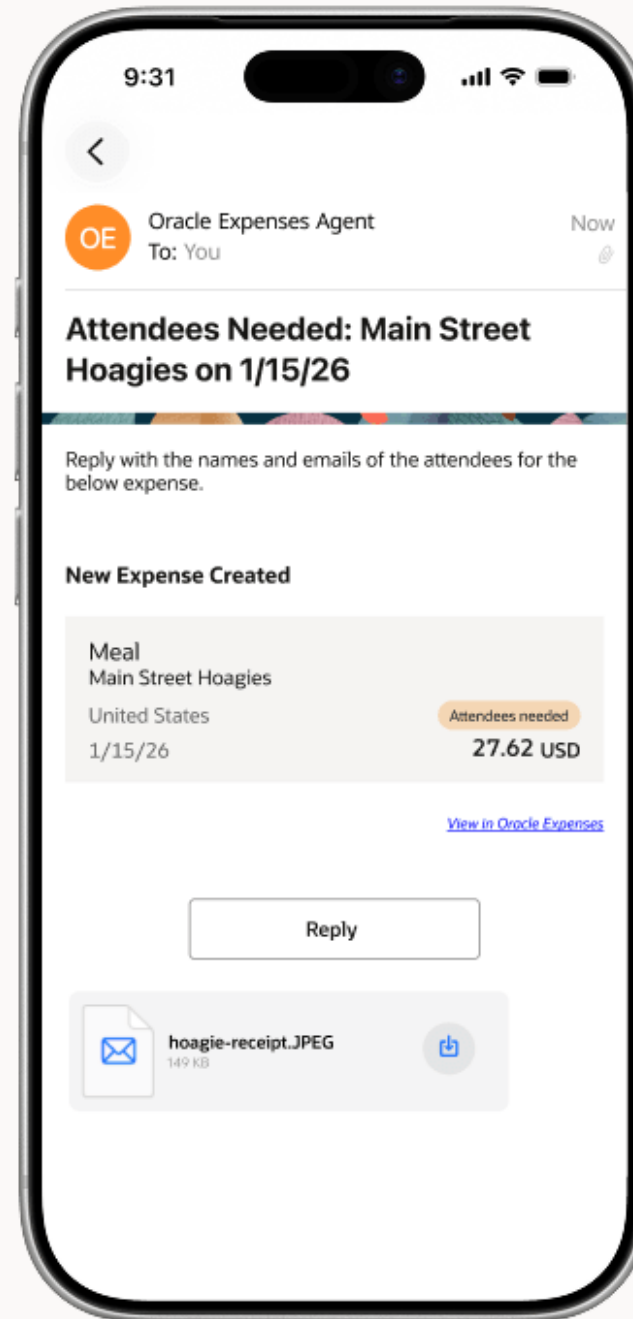


26B: Expenses Agent

Email-Based Expense Completion

Employees start by emailing receipts from meals, flights, or other expenses directly to the Expenses Agent. In line with company policy, employees may provide additional details, such as justifications, cost centers, or any personal expense amounts, within the email.

The Expenses Agent automatically processes this information, creates a new expense, and replies via email **if any required details are missing**, such as the names and emails of the attendees.

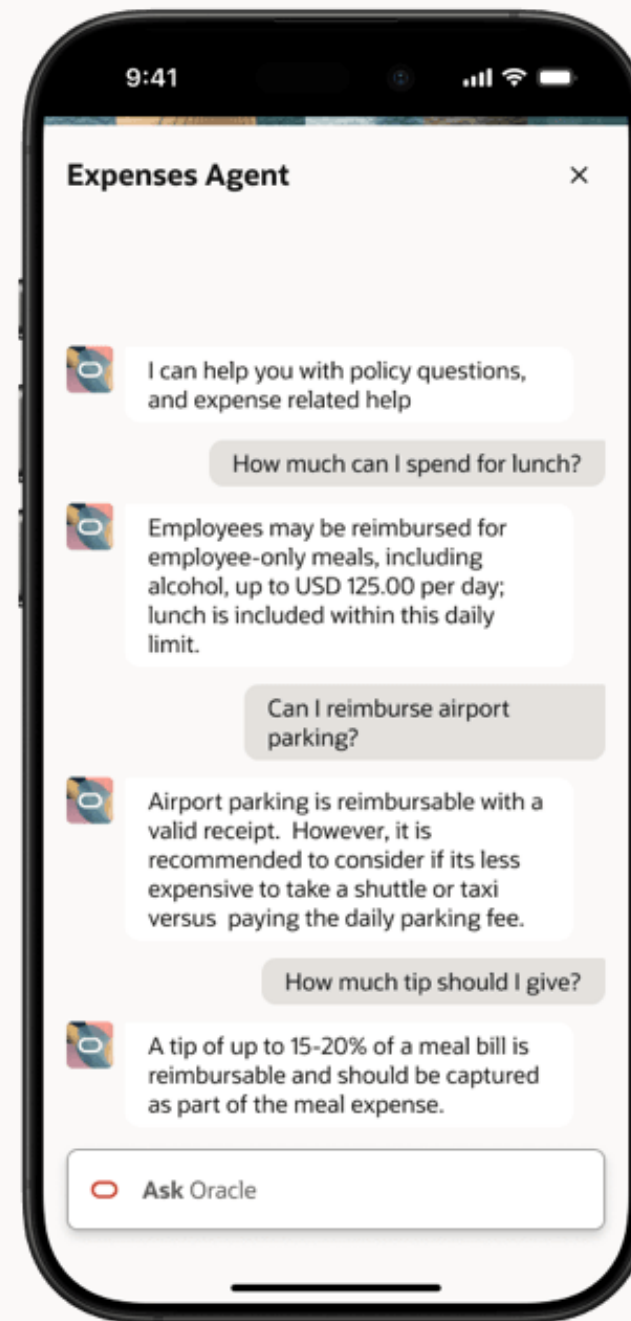


26B: Expenses Agent

Policy Inquiry

The agent can be used to answer questions about a company's travel policies. Expense managers can upload the organization's corporate travel and expenditure policies, allowing employees to use the agent to **receive contextual answers** to any questions related to these policies using the desktop or a mobile device.

This will help employees understand corporate policies before incurring business expenses and be aware of expense submission requirements.



26B: Expenses Agent

[Receipt Capture and Matching](#)

Employees can now view **itemization details** from corporate card data and accommodation receipts, assign spend authorization to expenses, and select any configured location format on the Expense Details page

✔ Expense Created

Luis, we have created this expense for you. You can make changes using the Oracle Expenses application.

Here's the expense:

Accommodation	248.00 USD
Ceasar Palace	3/23/24
LV expenses	United States
Receipt Summary	
Business	214.00 USD
Room Rate and Taxes	214.00 USD
2 nights	
Personal	34.00 USD
Parking	12.00 USD
Laundry	22.00 USD

[Review Expense](#)

26A: Expenses

Employee Expense Completion and Compliance Enhancements

With Touchless Expenses, employees can easily **capture project details**, stay within daily spend limits through policy enforcement, **resolve duplicates** with a guided two-item merge process, and manage corporate card obligations with **aging and dispute controls**.

9:41

Project

Project Number
220 – CRM ABC Corp

Task Number
1.2 – Data Migration

Expenditure Organization
Consulting – North America

Contract Number
000987

Funding Source
Customer Billable

Required

Cancel

Save

9:41

Expenses

Cancel Merge All

2 of 9 selected

<input checked="" type="checkbox"/>	Meals McCormick & Schmick's Receipt needed	2/11/25	335.50 USD
<input checked="" type="checkbox"/>	Misc. Expenses Landrys Inc. #3241	2/11/25	335.50 USD

Merge items?

The selected items will become one expense and will no longer be treated as separate expenses. If there is data conflict, some edits might be lost.

Cancel

Merge

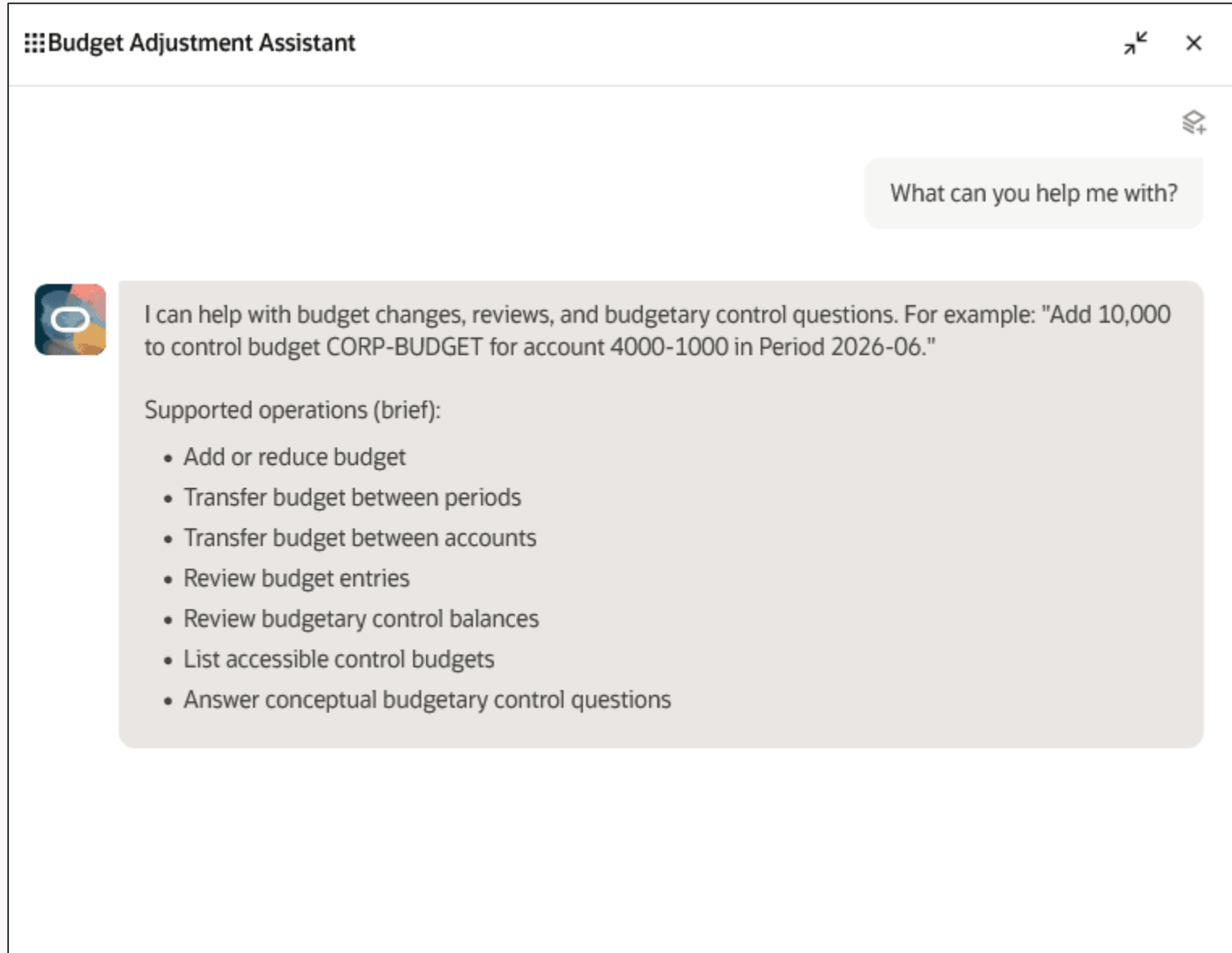
26C – Budget Agent

Budget Adjustment Assistant

The **Budget Adjustment Assistant** helps budget office users create budget entries using natural language for **Enterprise Performance Management (EPM) control budgets**. The assistant helps resolve any creation issues before the budget transaction is submitted. Users can also review approved budget entries and check budgetary control balances.

Use the Budget Adjustment Agent to:

- Add/Reduce budget to a budget account, period, control budget.
- Transfer budget amounts between accounts and periods
- Review Budgetary Balances
- Review Budget Entries



Budget Adjustment Assistant

What can you help me with?

I can help with budget changes, reviews, and budgetary control questions. For example: "Add 10,000 to control budget CORP-BUDGET for account 4000-1000 in Period 2026-06."

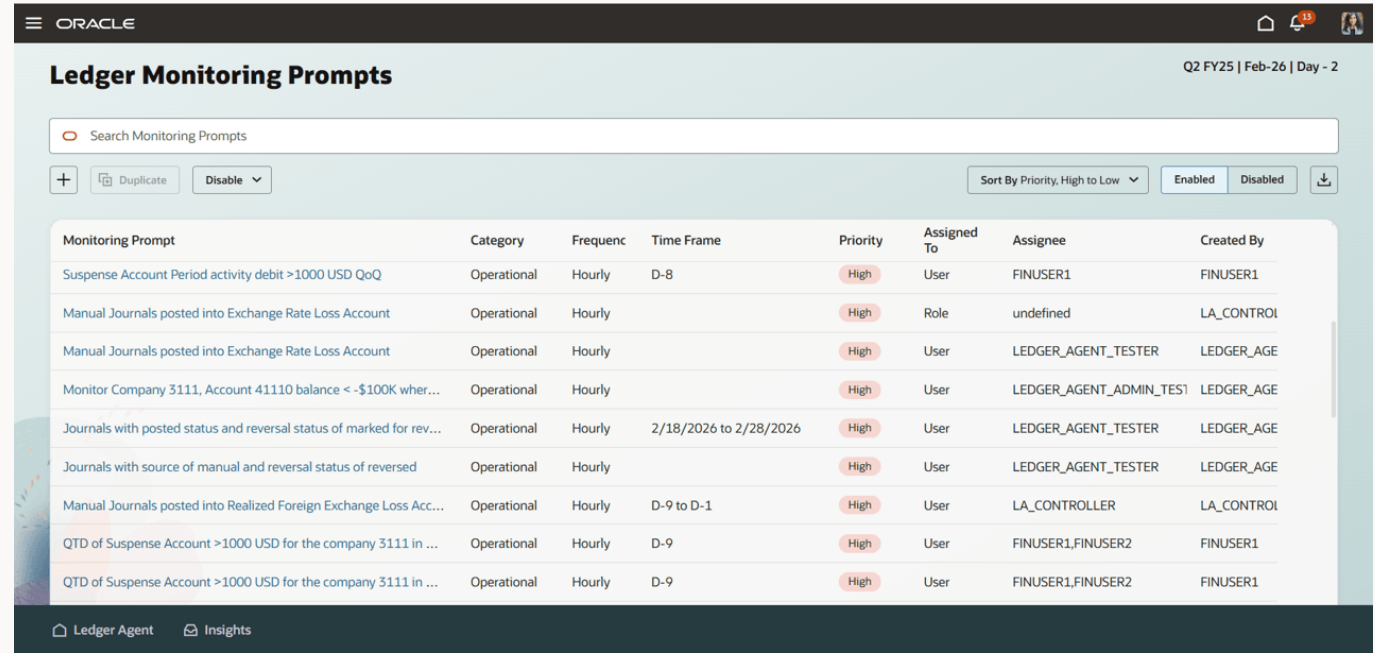
Supported operations (brief):

- Add or reduce budget
- Transfer budget between periods
- Transfer budget between accounts
- Review budget entries
- Review budgetary control balances
- List accessible control budgets
- Answer conceptual budgetary control questions

26B: Ledger Agent Agentic AI-Powered General Ledger Experience

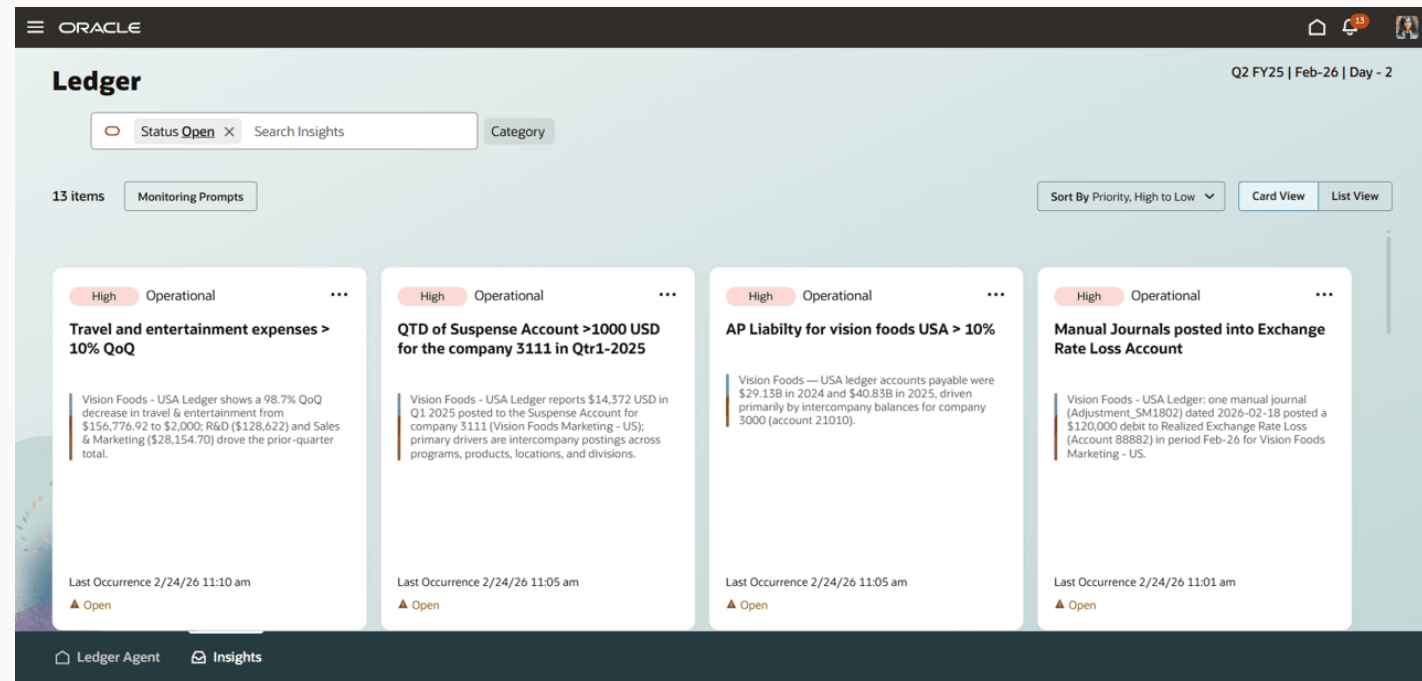
Proactively monitor balances, journals, and transactions, with prompt-assisted monitoring, surfacing them to accountants **only when intervention is required.**

Accountants can ask natural language questions about balances, variances, insights, and process statuses, and receive precise responses **significantly improving efficiency and business insight** into General Ledger processes.



The screenshot shows the Oracle Ledger Monitoring Prompts interface. At the top, there's a search bar for monitoring prompts and buttons for '+', 'Duplicate', and 'Disable'. A dropdown menu is set to 'Sort By Priority, High to Low', and there are 'Enabled' and 'Disabled' buttons. Below this is a table with columns: Monitoring Prompt, Category, Frequency, Time Frame, Priority, Assigned To, Assignee, and Created By. The table lists several prompts, all with a 'High' priority.

Monitoring Prompt	Category	Frequenc	Time Frame	Priority	Assigned To	Assignee	Created By
Suspense Account Period activity debit >1000 USD QoQ	Operational	Hourly	D-8	High	User	FINUSER1	FINUSER1
Manual Journals posted into Exchange Rate Loss Account	Operational	Hourly		High	Role	undefined	LA_CONTROL
Manual Journals posted into Exchange Rate Loss Account	Operational	Hourly		High	User	LEDGER_AGENT_TESTER	LEDGER_AGE
Monitor Company 3111, Account 41110 balance < -\$100K wher...	Operational	Hourly		High	User	LEDGER_AGENT_ADMIN_TES1	LEDGER_AGE
Journals with posted status and reversal status of marked for rev...	Operational	Hourly	2/18/2026 to 2/28/2026	High	User	LEDGER_AGENT_TESTER	LEDGER_AGE
Journals with source of manual and reversal status of reversed	Operational	Hourly		High	User	LEDGER_AGENT_TESTER	LEDGER_AGE
Manual Journals posted into Realized Foreign Exchange Loss Acc...	Operational	Hourly	D-9 to D-1	High	User	LA_CONTROLLER	LA_CONTROL
QTD of Suspense Account >1000 USD for the company 3111 in ...	Operational	Hourly	D-9	High	User	FINUSER1,FINUSER2	FINUSER1
QTD of Suspense Account >1000 USD for the company 3111 in ...	Operational	Hourly	D-9	High	User	FINUSER1,FINUSER2	FINUSER1

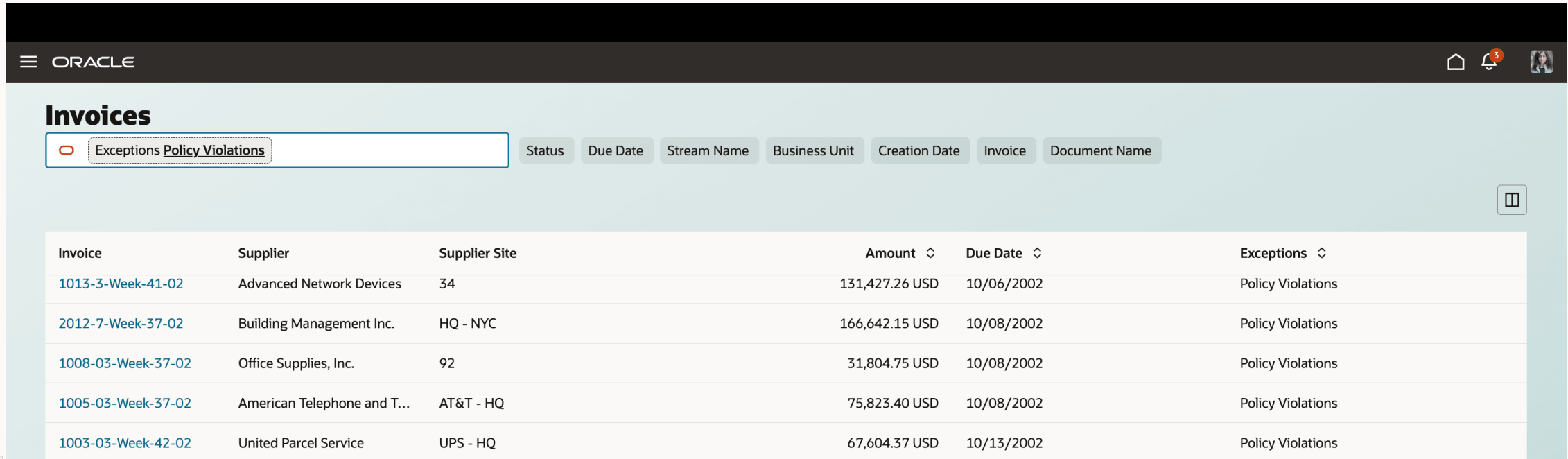


The screenshot shows the Oracle Ledger interface. At the top, there's a search bar with 'Status Open' and 'Search Insights' filters, and a 'Category' dropdown. Below this, there's a '13 items' indicator and a 'Monitoring Prompts' button. A dropdown menu is set to 'Sort By Priority, High to Low', and there are 'Card View' and 'List View' buttons. The main content area displays four cards, each representing a monitoring prompt with a 'High' priority and 'Operational' category. Each card includes a title, a brief description, and a 'Last Occurrence' timestamp.

Monitoring Prompt	Category	Priority	Last Occurrence
Travel and entertainment expenses > 10% QoQ	Operational	High	2/24/26 11:10 am
QTD of Suspense Account >1000 USD for the company 3111 in Qtr1-2025	Operational	High	2/24/26 11:05 am
AP Liability for vision foods USA > 10%	Operational	High	2/24/26 11:05 am
Manual Journals posted into Exchange Rate Loss Account	Operational	High	2/24/26 11:01 am

26B – Payables Agent

- The touchless experience is built on **unified invoice ingestion, automated processing, intuitive exception handling**, and straight-through processing from capture to payment readiness
- It standardizes and accelerates invoice handling with automated data enrichment, strong compliance controls, and full visibility.
- As part of this release, Document IO, a Gen AI-powered document ingestion agent, **becomes the default ingestion engine** for all customers
- This release also introduces a unified configuration framework named Capture. Invoice ingestion supports multiple file formats, languages, and multiple page documents with improved image recognition.
- View [Customer Cloud Connect replay](#) from May 27th



The screenshot displays the Oracle Invoices application interface. At the top, the Oracle logo is visible on the left, and navigation icons (home, notifications, user profile) are on the right. The main heading is "Invoices". Below the heading, there is a search bar containing "Exceptions Policy Violations" and several filter buttons: "Status", "Due Date", "Stream Name", "Business Unit", "Creation Date", "Invoice", and "Document Name". A table of invoices is shown below, with columns for Invoice, Supplier, Supplier Site, Amount, Due Date, and Exceptions. The table contains five rows of data.

Invoice	Supplier	Supplier Site	Amount	Due Date	Exceptions
1013-3-Week-41-02	Advanced Network Devices	34	131,427.26 USD	10/06/2002	Policy Violations
2012-7-Week-37-02	Building Management Inc.	HQ - NYC	166,642.15 USD	10/08/2002	Policy Violations
1008-03-Week-37-02	Office Supplies, Inc.	92	31,804.75 USD	10/08/2002	Policy Violations
1005-03-Week-37-02	American Telephone and T...	AT&T - HQ	75,823.40 USD	10/08/2002	Policy Violations
1003-03-Week-42-02	United Parcel Service	UPS - HQ	67,604.37 USD	10/13/2002	Policy Violations



26B: Payments Agent [Payment Options, Offers, and Execution](#)

The Oracle Payments Agent - consisting of insights, offers, options and execution - transforms the payments process from a focus on just paying suppliers to using the outstanding payment information to evaluate payment options and benefits in light of **working capital goals**.

The agent works with users to manage and **optimize payment processing** using conversational and insights-driven experiences.

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Insights

Status **Open** X Search Insights Category

3 items Monitoring Prompts

High Payment Runs

Payment runs requiring attention

There are three payment process requests pending installment review; the oldest is 20 days, and one payment failed validation.

Last Occurrence 05/19/2026 1:00 pm

▲ Open

Medium Supplier Offers

Invoices in shortlisted supplier offers not ready for payment

USD 2,633,001.25 is outstanding across 37 invoices; 31 suppliers have 32 shortlisted offers not ready for payment under the Dynamic Discounting program.

Last Occurrence 05/19/2026 6:36 am

▲ Open

Insights Payments

26C – Retirement Request Assistant

The Retirement Request Assistant streamlines the asset retirement process by providing a simplified way for asset custodians to submit and track asset retirement requests through a guided conversational experience.

Asset custodians can raise retirement requests in two ways.

- Asset Custodians can start by typing “Retire my assets” from the assistant to **view and select assets** assigned to them for retirement
- They can submit requests for assets that **are not assigned to them** by providing one of the identifiers like Serial Number or Tag Number.



My Asset Retirement Requests

I've pulled together your recent asset retirement requests. Here's their current status.

You've submitted **1** requests — **1** pending approval.

Row	Request Id	Submission Date	Description	Tag Number	Serial Number	In Service Date	Retire Date	Retirement Reason	Status
1	20010	5/29/26	Dell UltraSharp 52 Thunderbolt Hub Monitor - U5226KW without stand	IT-2026-0061	DELLX9A72P67	1/1/26	1/20/26	Sale	● Pending Approval

If you'd like, I can help you submit new requests.

26C – Asset Inquiry Assistant

You can ask the assistant to show the following categories of details for a particular asset:

- General, Financial, Depreciation, Distribution

Depreciation Details as requested

Book VISION OPERATIONS CORP

Asset Number 126305

Period Apr-26

Ledger Name Vision Operations (USA)

Currency USD

Cost 299.00

Depreciate Yes

Depreciable Basis Amount 299.00

Period	Distribution ID	Distribution Cost	Depreciation Amount	YTD Depreciation	Depreciation Reserve	Depreciation Adjustment Amount	Bonus Depreciation Amount	Bonus YTD Depreciation Amount	Bonus Depreciation Reserve
Mar-26	174246	299.00	8.31	24.93	24.93	0.00	0.00	0.00	0.00
Feb-26	174246	299.00	8.31	16.62	16.62	0.00	0.00	0.00	0.00
Jan-26	174246	299.00	8.31	8.31	8.31	0.00	0.00	0.00	0.00

Do you want more asset details? Enter an option below.

- General Details
- Financial Details
- Distribution Details

If you want to inquire about any other asset, kindly enter the asset number. For example: "show me list of assets that ends with [search string] in [book name] book"

26B: Assets and Leases



Lease Payables Processing for Approved Payments

Lessees typically **pay their lessors each period** for rent, service, insurance, common area maintenance charges, or other amounts included in the leases.

Create lease invoices automatically in Payables for payment processing using the Expense Lease Payments process. After lease administrators review and approve lease payments, they can now schedule the Expense Lease Payments process to export only approved payments to Payables

Name Process Lease Accounting

Description This program processes the lease accruals and s...

Schedule As soon as possible

Basic Options

Parameters

* Process Type	Lease Payments	▼
* Business Unit	Vision Operations	▼
Lease Number		▼
Period		▼
From Payment Due Date	01/01/26	📅
To Payment Due Date	01/31/26	📅
Payment Type		▼
Payment Purpose		▼
Supplier Name	Allied Manufacturing	🔍
Supplier Site		🔍
Payments Processing		▼
Export to Payables	Yes	▼
Launch Import Payables Invoice		▼

26A: Assets and Leases



Project-based Expense Lease Payments

Lease administrators can now track lease payments to a project and record the **project information on lease invoices** created in Oracle Payables for payment processing. Capture these project details on lease payments: project name, task, and expenditure information.

The screenshot displays the 'Create Payment' form in Oracle Payables. The form is titled 'Create Payment' and is set to 'Ledger Currency USD'. It contains several fields for payment details:

- * Payment Template:** VO_QA_PTT1
- * Supplier:** Advanced Network Devices
- * Supplier Site:** FRESNO
- Asset Number:** 29255
- * Start Date:** 01/01/25
- End Date:** mm/dd/yy
- * Amount:** 1,000.00
- Arrears:**
- * Payment Purpose:** Base Rent
- * Payment Type:** Base Rent
- * Frequency:** Monthly
- Number of Payments:** 24
- * Currency:** USD
- Conversion Rate:**

The **Project** section is highlighted with a red box and includes:

- Project Number:** CDRMPJB IC Project
- * Task Number:** 178
- * Expenditure Type:** Rent
- * Expenditure Organization:** Vision Operations

At the bottom right, there are three buttons: **Save and Close**, **Create Another**, and **Cancel**.

[YouTube Feature Overview](#)


26A: Assets and Leases

Automated Asset Creation Enhancements from Payables Invoices

Automatically update the status of **asset invoice addition lines to Post** when all required asset creation details, such as asset category, location and assignments, are available.

Additionally, assign a default asset book to these lines, based on the secondary balancing segment value, along with the other qualified segments of the asset clearing account.

Accounts

* Account Defaults 01-000-9999-0000-000 

* Net Book Value Retired Gain 7854 ▼

* Net Book Value Retired Loss 7855 ▼

* Proceeds of Sale Gain 7851 ▼

* Proceeds of Sale Loss 7852 ▼

* Proceeds of Sale Clearing 1247 ▼

* Cost of Removal Gain 7852 ▼

* Cost of Removal Loss 7853 ▼

Rules

Reference Data Groups **Invoice Rules**

Use Payables invoice date as date placed in service

Allow unallocated Payables invoice lines

Suspend automatic merge of Payables invoice lines

Default status to Post for Payables invoice lines

26B – Business Rules for Key FlexFields on Redwood Employment Processes



Business Rules now support key flexfields, including **Default Expense Account** and **People Group**, across Redwood Employment processes. This enables defaulting and validation logic for key flexfield segments within employment update, add employment, add assignment, and local and global transfer processes.

BasedOnJob

Active

Add description

Condition ? Edit

if Job (Assignment) equals 300100182492448

Regions and Fields

Show only fields with overridden properties

Filter

	Required	Hidden	Read Only	Value
Assignment (2)				
A Default Expense Account ● ⓘ	—	—	—	1.102.1000.20...
A People Group ●	—	—	—	04.05

26A – Prevention of Self-Review & Completion of Receivables Transactions

Prevent users from **reviewing and completing their own submitted transactions**. Even if a user is explicitly designated as an approver, they will be restricted from approving their own transactions.

By preventing self-approval, the application **maintains proper segregation of duties**, minimizes the risk of fraud, and promotes accountability.



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Review Transaction: Invoice 324

Actions ▾ **Withdraw** **Cancel**

General Information | [Show More](#)

Business Unit	Vision Operations	* Transaction Date	10/31/25	* Currency	USD US Dollar
Transaction Source	Manual - User Based	* Accounting Date	10/31/25	Transaction Total	2,400.00
* Transaction Type	Invoice : All Lines	Salesperson		Lines	2,000.00
Transaction Number	324	Invoicing Rule		Tax	400.00
Document Number		Attachments	None +	Freight	0.00
Status	Pending Approval	Notes		Charges	0.00

Customer

* Bill-to Name	AT&T CORP	Ship-to Name	AT&T CORP	* Payment Terms	30 Net
* Bill-to Site	TCA	Ship-to Site	18682	Due Date	11/30/25

Payment

26B: Budgetary Control

Deep Links for Budget Entries and Budgetary Control Balances

Use deep links to the Review Budget Entries and Review Budgetary Control Balances pages to **access budgetary control inquiry pages directly from reports and dashboards.**

Drill-down from a budget balance column opens the Review Budget Entries or Review Budgetary Control Balances page. Drill-down from commitment, obligation or expenditure columns opens the Review Budgetary Control Balances or Review Budgetary Control Transaction page.

Control Budget Balances Sample with Deep Link

Control Budget Budget 2025 Budget Period

Concatenated Segments	Total Budget	Commitments	Obligations	Other Anticipa Expenditures
0001-9501-3310	2200		1000	
0001-9501-3320	1800 ⁿ		200	
0001-9502-3310	140			
0001-9502-3320	1400			

[Review Budget Entries](#) [Review Budgetary Control Balances](#)

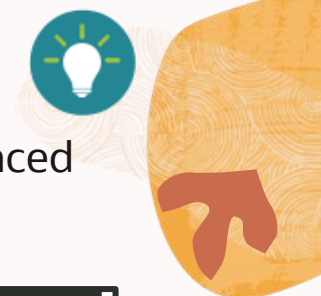
Review Budget Entries

Control Budget Budget 2025 Budget Account 0001-9501-3320
Budget Currency USD Budget Balance 18,000.00 USD
Budget Period Jan-25

View Wrap

Budget Entry Date	Budget Entry Name	Source Amount	Amount Changed
1/30/26	2025 Initial 30-01-26 19:15:43 PM	18,000.00	18,000.00
Total			18,000.00

26C – Risk Mgmt: New 'My Access Requests' Dashboard



Use a pre-built dashboard to monitor requesters' access request activity and approvals based on the new Advanced Access Requests subject area introduced in 26B

The screenshot shows the 'My Access Requests' dashboard within the Risk Management system. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'Create', and 'Open'. The main navigation menu lists 'Access Algorithms', 'Transaction Algorithms', 'Access Certifications', 'Internal Controls', 'IT Superuser Activity Monitoring', and 'My Access Requests' (which is selected). The dashboard title is 'My Access Requests Dashboard'. Below the title is a 'Summary' section with a note: 'Click on the 'Approved Requests' and 'Rejected Requests' count to view details on approved and rejected requests, respectively.' The summary displays six metrics: Total Requests (2), New Requests (0), Pending Review (0), Pending Approval (0), Approved Requests (0), and Rejected Requests (0). Below the summary is the 'Access Request Details' section, which contains a table with the following data:

Request ID	Request Date	Requester	Requested On Behalf Of	Temporary Access	# Temporary Days	Justification	Role Name	Role Code	Role Description	Status	Approved/ Rejected Date
2	08/23/2023	Philip Kent	Philip Kent	No		Review journal entries	General Accountant	ORA_GL_GENERAL_ACCOUNTANT_JOB	Records and reports financial transactions and manages revenue, expense, asset, liability and equity accounts. Responsible for recording accounting adjustments, accruals, allocations, currency revaluations and translations.	WITHDRAWN	



Procurement for Self Service



26B/C : Requisition Agent

Quote to Purchase Requisition Chat Assistant

In update 25D, we introduced the [AI Agent: Quote to Purchase Requisition Assistant](#) feature, which parses emails containing supplier quotations and automatically converts them into purchase requisitions.

Now, this automatic conversion can also be initiated directly from chat, allowing users to upload supplier quotations within the chat interface.

As of 26C, the agent can be **launched from the actions drop down.**

The screenshot shows the Requisition Agent chat interface. At the top, there is a 'Preferences' button. A dropdown menu is open, listing several actions: 'Ask AI', 'Shopping Lists', 'Scan Barcode to Search Catalog', 'Enter Requisition Line', 'Request New Supplier', 'Update Preparer and Requester', and 'Create Requisition from Supplier Quote'. The 'Create Requisition from Supplier Quote' option is highlighted with a red border. Below the dropdown, a chat window titled 'Requisition from supplier quote' is visible. It contains a 'Drag and Drop' area with the text 'Select or drop files here.' and a message: 'I need to create a req from a supplier quotation'. The chat history shows a user asking for instructions, the agent providing instructions to attach a quote and use the 'Create Requisition' button, the user uploading a PDF file named 'ANT_Quote.pdf' (143.90 KB), the agent asking for approval, and the user clicking 'Approve'. The final message from the agent states: 'Your purchase requisition 10504987 has been successfully created based on the quotation from Advanced Network Technology (344051). However, we encountered an error computing the tax.'

Demonstration

26B: Requisition Agent

Requisition Creation Guide

You can view **the top three matching results**, with one result tagged as the best match. The best match is the first item returned based on the search relevance score. This helps you decide how to proceed.

The results include additional details such as images, item descriptions, currency, price, unit of measure, and item category. If an agreement exists, the agreement number is also displayed.

Note: Only master items and agreement lines assigned to the line type "Goods" are returned in search results. Master items that are only internally orderable are excluded. Other catalog items, such as smart forms, informational templates, punchout catalogs, or search items, are not included in the results.

I want to order 2 widescreen monitors

Here are the most relevant results for your search. I have tagged the best match.

- #1 **Best Match**
19" Widescreen Monitor
\$127.00 Each
Monitors
Agreement: 1002429
- #2
22" Widescreen Monitor
\$229.00 Each
Monitors
Agreement: 1002429
- #3
17" Widescreen Monitor
\$98.00 Each
Monitors
Agreement: 1002429

Click **Approve** to select the best match and add it to the requisition.

Click **Request Change** to select other items.

Key in new criteria to start a new search.

Ask Oracle

26A – Recommend Purchasing Category

Get the Best-Fit Purchasing Category Recommendation for a Noncatalog Request

Create Noncatalog Request Cancel Add to List Add to Cart

Item Description

Item Type
Goods billed by quantity

Category

Suggest

Required

Required

Create Noncatalog Request Cancel Add to List Add to Cart

Item Description
Laptop

Item Type
Goods billed by quantity

Category
Computers

Suggest

26B/C – Identify Attachments and Notes on My Requisitions

In update 26B, we introduced the Identify Attachments and Notes on Requisition Lines feature, which displays an icon next to requisition lines with notes or attachments in the shopping cart and on the Requisition Line Details page. In this update, we're extending this capability to the My Requisitions page.

Cart
Requisition 10504978

Submit

> More information

Search for lines by description, category, or source

4 items

Duplicate Edit Multiple

Line	Description	Category	Source	Quantity	UOM	Notes and Attachments	Edit	Delivery	Billing
5	Ergonomic foldbale and portal	Office Supplie		1	Each				
	Draft	Mechanical Pencil, Disposable, 0.5 mm Lead		1	Each				
	Draft	Mechanical Pencil, Disposable, 0.5 mm Lead		1	Each				
10504310	Core Assembly								
	Approved	Core Assembly	Approval Date: 9/24/24						

Requisitions Lines

4/16/26

9/24/24

26A/B/C: Redwood Features

[View Additional Information About Preparers, Requesters, Buyers, and Approvers](#)

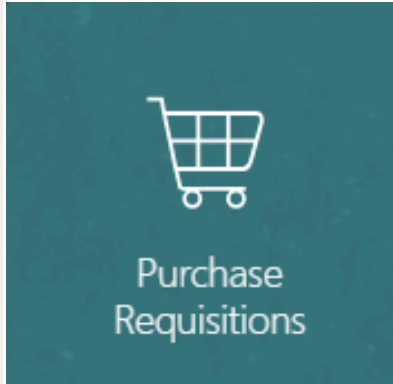
[Manage Public Shopping Lists \(Redwood\)](#)

[Retain Column Personalizations for Table Layouts](#)

[View Budget Details with Funds Check Results](#)

[Review Charge Account Descriptions on Requisition](#)

[Redwood: Duplicate a Purchase Order or Its Lines When Editing the Purchase Order](#)

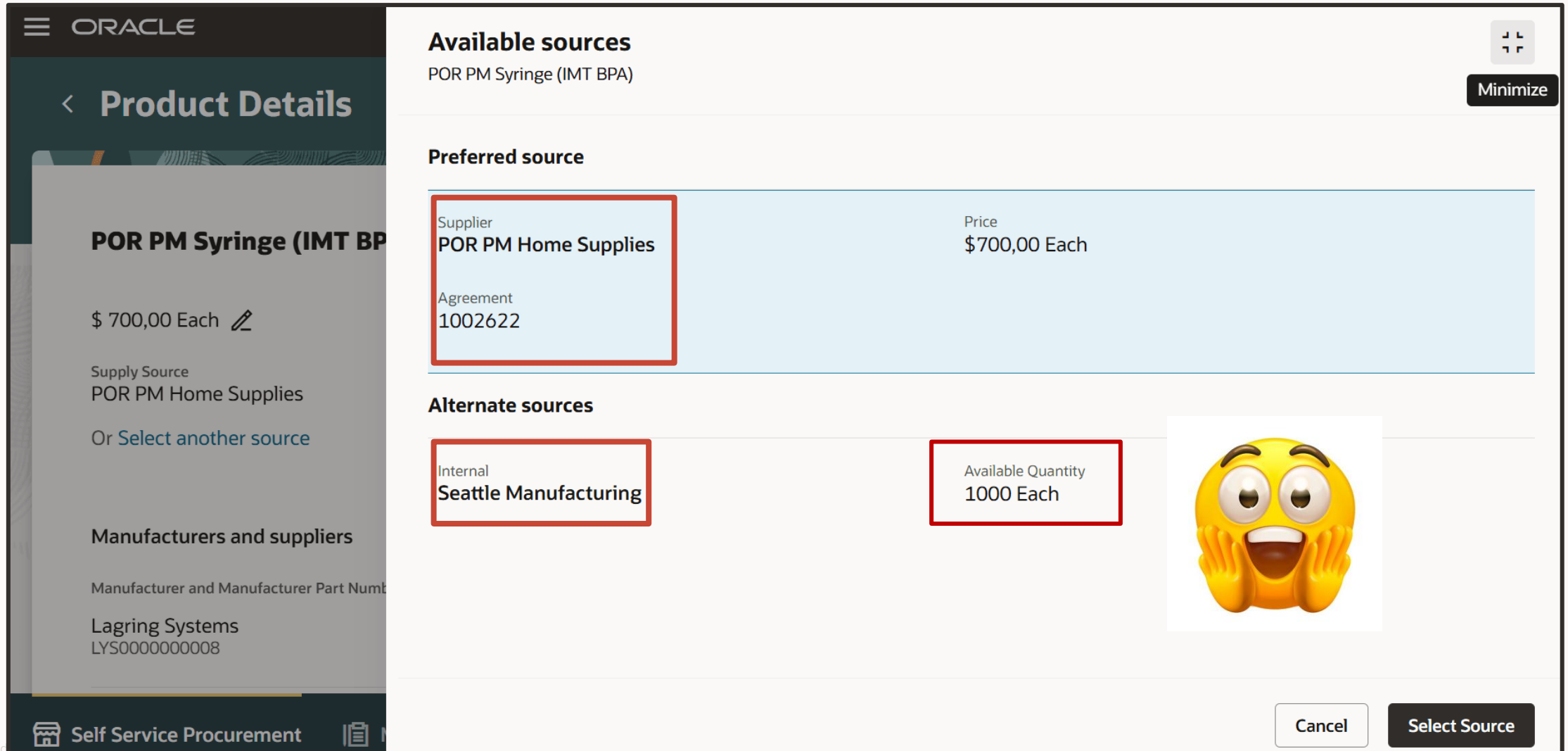


A screenshot of the Oracle Redwood interface. On the left, a teal button with a shopping cart icon and the text "Purchase Requisitions" is visible. To its right is a table with columns for "Total" and "Requester". A row in the table shows a value of "100.00 USD" and the name "Alex Anders", which is highlighted with a red box. On the far right, a user profile card for "Alex Anders" is displayed, showing his title as "Category Manager" and various contact details including email, work phone, and work address.

Combination details		
Segment	Value	Description
Company	01	Operations
Department	580	Maintenance
Account	7740	Miscellaneous
Sub-Account	0000	No Sub Account
Product	000	No Product

26A – Procure Goods from Preferred Sources Using Shopping Lists

- Advanced users can select sources from a **list of available sources**, while shopping using a shopping list.



The screenshot displays the Oracle Self Service Procurement interface. On the left, a 'Product Details' sidebar shows the product 'POR PM Syringe (IMT BPA)' with a price of '\$ 700,00 Each' and a supply source of 'POR PM Home Supplies'. The main content area is titled 'Available sources' for 'POR PM Syringe (IMT BPA)'. It features a 'Preferred source' section with a table listing 'POR PM Home Supplies' at a price of '\$700,00 Each' and an agreement number '1002622'. Below this is an 'Alternate sources' section listing 'Seattle Manufacturing' with an 'Available Quantity' of '1000 Each'. A yellow 'face with hands raised' emoji is placed next to the alternate source. At the bottom right, there are 'Cancel' and 'Select Source' buttons. A 'Minimize' button is located in the top right corner of the 'Available sources' panel.

Supplier	Price
POR PM Home Supplies	\$700,00 Each

Source	Available Quantity
Internal Seattle Manufacturing	1000 Each

26B – Navigate Directly to Different Requisition Lines

You can now directly access line details from the shopping cart to view more information about a specific line. The line description link when clicked opens the line details drawer. Navigate between lines while editing as well.

Requisition Line Details
Requisition 10504409, Line 6

Cancel Save Save and Close

Line Details Delivery Details Billing Details

Item
POR PM Humidifier

Line Description
POR PM Humidifier

Category
POR PM Item Category

Pricing

Quantity
1

UOM
Each

Price
24,500.00

Currency
USD

Line
Line 6 - POR PM Humidifier

Line 3
Goods

Line 4
Goods

Line 5
POR PM Dixie Cup (Consigned)

Line 6
POR PM Humidifier

26B: Requisitions

Create Requisitions with Credit Lines

Greater Flexibility: Offer more purchase options, including trade-in credits, rebates, and discounts after negotiation.

Process Efficiency: Eliminate the need for manual workarounds when capturing credits, improving compliance and making audits easier.

Accurate Record Keeping: Capture ordered items, discounts or credits, and the total amount payable in the same requisition document.

Create Noncatalog Request

Item Description

Item Type
Credit request

Category
Required

Suggest

Credit request

Goods billed by quantity

Services billed by amount

Services billed by quantity

Currency
USD

Source

Supplier
Required

Supplier Site

Procurement



26C: Validate Taxpayer ID on Registration

[Redwood: Validate Taxpayer ID in Supplier Registration with TINCheck by Sovos](#)

The taxpayer ID entered during supplier registration or while creating a supplier directly is validated through an **external call to the Sovos TINCheck** API.

Both, the supplier name and taxpayer ID are required to perform the validation

Supplier Registration Approval

Inc.

Requested By	Casey Morgan
Request Date	5/8/26
Procurement BU	Vision Operations
Source	Internal
Business Relationship	Spend Authorized
Organization Type	Corporation
Tax Country	United States
Taxpayer ID	<input type="text"/> ✓ Taxpayer ID is valid and belongs to the supplier
Request Reason	New Supply Source

Actions: Approve, Reject

The outcome of the Taxpayer ID validation presented to registration approver

Edit Profile

The outcome of the Taxpayer ID validation

⚠ Taxpayer ID isn't valid

Details: Taxpayer ID and supplier name combination does not match IRS records.

Organization Details | Addresses | Contacts | Sites | Transaction Tax

26A – Redwood: Process Requisition Lines into Supplier Contracts

- Convert requisitions into comprehensive enterprise contracts that enforce corporate policies, manage risk, and ensure compliance with contractual and regulatory requirements.

The screenshot shows the 'Sourcing details' section of a 'Staged Document' in Oracle Redwood. The document ID is 260. The 'Sourcing Method' is set to 'Initiate contract', which is highlighted with a red box. Other fields include Procurement BU (Vision Operations), Requisitioning BU (Vision Operations), Sold-to Legal Entity (Vision Operations), Contract Type (Buy - Items and Service procurement), Supplier (CV_SuppA01), Supplier Site (CVSuppA01Site01), and Currency (USD). There are 'Cancel' and 'Save' buttons at the bottom right of the form.

Sourcing details

Sourcing Method
 Place order Initiate negotiation **Initiate contract**

Procurement BU: Vision Operations
Requisitioning BU: Vision Operations
Sold-to Legal Entity: Vision Operations
Contract Type: Buy - Items and Service procurement

Supplier: CV_SuppA01
Supplier Site: CVSuppA01Site01
Currency: USD

[Suggest alternate suppliers](#)

Lines

Requisition: 10504391
Staged Document Amount: 600.00 USD

Requisition	Line	Order Line	Item	Line Description	Requester	Quantity	Price	Amount	Attachments	Notes	Suggested Supplier
10504391	1		INV-100	Plain Item	Rosalinda Fillion	10 Each	10.00 USD	100.00 USD			CV_SuppA10
10504391	2			Description based line	Rosalinda Fillion	10 Each	20.00 USD	200.00 USD			
10504391	3			Services	Rosalinda Fillion			300.00 USD			

Navigation: Requisitions | Staged Documents (3) | Action Status

26B: Sourcing

AI Agent: Research Suppliers with AI

Use the new AI driven search experience by simply describing what suppliers you're looking for based on the items or services you want to procure.

The AI agent will understand your search request and provide you a list of suppliers by searching historical transactions and the supplier profile. It will also present a **summary of how it interpreted your search request** to provide the supplier list.

The screenshot shows the 'Sourcing' interface. At the top, there's a 'Recent Negotiations' section with a count of 25. Below this is a table of negotiations with columns for Negotiation ID, Status, Title, Supplier Responses, Unread Messages, and Last Activity. The table lists several RFQs and an Auction. To the right of the table is an 'Actions' sidebar with links for 'Negotiations (New)', 'Supplier Responses (New)', and 'Research Suppliers (New)', which is circled in red. Below the table is a 'Quick access' section with a search input.

Negotiation	Status	Title	Supplier Responses	Unread Messages	Last Activity
RFQ 39582	Draft	Office Furniture	0	0	Updated 2/12/26
RFQ 39579	Draft	Annual Software License Renewal	0	0	Updated 2/12/26
RFQ 39578	Award in progress	Engineering Services FY2026	1	0	Award saved 2/12/26
RFQ 39576	Closed	Sustainability Initiatives in Packaging Materials	8	0	Scoring opened 2/12/26
RFQ 39574	Draft	Corrugated Box Pricing	0	0	Updated 2/11/26
RFQ 39573	Closed (Locked)	Preventive Maintenance Contract - CNC Machines	12	0	Closes 2/11/26
RFQ 39572	Draft	Medical Equipment Purchase	0	0	Updated 2/11/26
Auction 39570	Draft	Strategic Sourcing - Preferred Travel Agency	0	0	Updated 2/11/26

Research Suppliers

Search: Show vendors of networking solutions that aren't privately owned

Showing results for suppliers of Networking Solutions, excluding those with private ownership.

2 suppliers

Supplier	Purchase Agreements	Purchase Orders	Sourcing Only	Negotiations Invited
Green Corp.	41	99		34
Seven Corporation	8	65	✓	21

26B – Redwood: Capture New Supplier Items in Negotiations

Suppliers can now provide **new supplier items for both inventory and description-based** line items when submitting responses in the Redwood supplier portal. The provided supplier items are automatically copied to the purchasing documents generated upon award. Additionally, if no existing supplier item is associated with the inventory item, the new supplier **item is automatically added** to item relationships in Product Information Management (PIM).



Quote 183876 Draft Validate Save Submit

RFQ 40185: Battery Procurement 2026-27

Attachments

Drag and Drop
Select or drop files here.

URL
http://www.alliedbatteries.com Add URL

Lines

Search by item, description, or category

From Line To Line

2 items Add Alternate Add Price Breaks Delete

Line	Description	Supplier Item	New Supplier Item	Manufacturer	Manufacturer Part Number	Start Price (USD)	Response Price (USD)	Estimated Quantity	Attachm	Action
<input checked="" type="checkbox"/> 1	High capacity battery		Z-9938G	Aero Tech	AT001	780.00	750.00	200	Add	
<input type="checkbox"/> 2	Eco friendly battery	9404119		Allied Manufacturing	ALM0000-00102	920.00	850.00	100	Add	

Response Amount
\$235,000.00

Projects and Grants



26C: Project Agents

26C Project update includes a several new project agents, along existing prompts now migrated to Fusion AI Agent Studio.

Module	Agent Name
Planning	Project Change Order Initiation Assistant
	Project Change Summary Generation Assistant
	Project Proposal Generation Assistant
Financials	Project Cost Adjustment Assistant
	Project Cost Exceptions Assistant
	Project Contract Bill Transactions Assistant
	Project Capitalization Analyst
	Project Contract Invoicing Assistant
	Project Contract Validation Assistant
	Project Contract and Sales Order Reconciliation Assistant
	Project Billing and Revenue Event Creation Assistant
	Project Contract and Customer Purchase Order Reconciliation Assistant
Performance	Program Progress Summary Generator
	Program Performance Advisor

26C – Automatic Creation of Rebills when Canceling Invoices



Cancel and rebill project contract invoices with a single action, **allowing adjustments as needed on the rebill** before resending them to the customer. This links the original invoice, credit memo, and rebill invoice, ensuring that the relationship is displayed on the rebill invoice to **comply with legislative requirements** in certain jurisdictions. Rebill functionality available for non-project invoices as well.

Invoice 1 ? Done

Edit invoice lines or the line details, and make necessary adjustments and corrections before releasing and approving the invoice. Last Saved 4/27/26 10:05 AM

Invoice Contract

Invoice Header ?

Currency = US Dollar | Amounts in Invoice Currency

Number 1	Bill-Through Date 4/27/26
Status Accepted	Invoice Type Standard invoice
Bill-to Customer AT&T Universal Card	Receivables Number 7023
Contract Number 78912	Tax Amount 197.00
Date 4/27/26	Invoice Amount 985.00

[Show More](#)

Invoice Lines ?

Actions ▼ View ▼ 📄 🔍 🔗 **Detach**

Review SF270 **Preview** **View Receivables Invoice** **Actions** ▼

- Calculate Tax
- Generate Adjusted Invoice
- Create Credit** ▶
- Adjust Transactions ▶
- Recalculate Invoice Details
- Transfer to Receivables

Cancel Invoice

Cancel and Rebill Invoice

Write Off Invoice

Apply Concession

26B – Labor Costing by Project Role



Cost project labor hours using **project role-based rates**. Labor costing by project role enables precise cost tracking and margin analysis by aligning actual labor costs with project roles used in planning and billing, resulting in improved accuracy and decision making. Consider this an option when actuals from payroll and timecards are not utilized.

Manage Financial Project Settings Fox Stores HCM Upgrade

General Parties Planning Financial Reporting **Cost Rate Overrides**

View + X [Grid] [List] [Print] [Refresh] [Help] [AM] [Done]

Save Cancel

Task	Person Name	Project Role	Job	Expenditure Type	* Rate	* Currency	* From Date	To Date
	Lynch, Katie	Business Analyst		Overtime	50	USD	2/1/26	m/d/yy
	Lynch, Katie				35	USD	2/1/26	m/d/yy
	Lynch, Katie	Business Analyst			40	USD	2/1/26	m/d/yy
		Business Analyst			30	USD	2/1/26	m/d/yy

26B – Award-Specific Viewer Access



Assign view-only access to specific awards, rather than access to all awards within a business unit

Edit Award Details ?
Oncology data research

Business Unit Vision City Operations **Contract Start Date** 10/1/24
Legal Entity Vision City LE **Contract End Date** 9/30/29
Primary Sponsor Dept of Health and Human Services (DHHS) **Status** Draft
Principal Investigator phil Williams **Total Award Amount** 300,000.00 USD

General Financial Compliance **Personnel**

Personnel ?

View + ×

Internal	* Person	Role	* Start Date	End Date	Credit Percentage
<input checked="" type="checkbox"/>	Lisa Collins	Award Member	10/1/24	m/d/yy	
<input checked="" type="checkbox"/>	phil Williams	Principal Investigator	10/1/24		100
<input type="checkbox"/>	Charles Watson		10/1/24	9/30/29	

26A – Control Access to Contracts Using Access Groups

Access groups are an alternative way of granting data permissions to users

Questions?

