

## R12.2.9 Oracle iProcurement Fundamentals

Oracle E-Business Suite

DURATION

**3 Days**

MODULES

**6 Lectures**

COURSE CODE

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### Course Overview

Administrators learn how to analyze information to plan their iProcurement stores. The course includes instructions on setting up local stores.

### What You Will Learn

#### Oracle iProcurement Procure to Pay Lifecycle Overview

- Objectives
- Procure to Pay Lifecycle
- Oracle Procure to Pay Process
- Demand: Requisitions
- Source: RFQs and Quotations
- Suppliers
- Quiz
- Purchase Orders
- Quiz
- Receiving
- Invoicing
- Payment
- Overview of Oracle Application Integration
- Summary

#### Oracle iProcurement Overview

- Objectives
- Procure to Pay: Oracle iProcurement
- Oracle Advanced Procurement
- Oracle iProcurement In E-Business
- E-Business Suite Integration
- Procurement Suite Integration

- Key Functionality of Oracle iProcurement
- Oracle iProcurement Content Management
- Content Zones
- Stores
- Shopping
- Overview of Checkout
- Approval and Document Creation
- Quiz
- Overview of Receiving
- Center-Led Procurement
- Oracle iProcurement Shopping Data Flow
- Quiz
- Oracle iProcurement: Submit Request Data Flow
- Quiz
- Oracle iProcurement Setup Overview
- Oracle iProcurement Setup Steps
- Summary

## Oracle iProcurement Content Management

- Objectives
- Procurement Process: Oracle iProcurement
- What Are iProcurement Catalogs?
- Why Use Catalogs?
- What Is an iProcurement Store?
- Where Does the Catalog Content Come From?
- Oracle iProcurement Content Management
- Local or Buyer-Hosted Content
- External or Supplier-Hosted Content
- External Marketplace-Hosted Content
- Choosing Content
- Requirements of Local Catalogs
- Requirements of Supplier-Hosted Content
- Requirements of Marketplace-Hosted Content
- Utilization of Catalog Content
- Control Content Using Content Zones
- Stores: Pulling It All Together...
- iProcurement Catalog Administration
- Creating Local Content
- Oracle iProcurement Content Management Review
- Oracle Content Utilization Types
- Local Content
- E-Business Suite Local Content
- Quiz
- Uploading Local Content
- Before Uploading Content

- Upload Content: Resource Files
- Item Content That You Upload
- Uploading Local Content
- Content Upload And Document Types
- Automatically Uploading Shopping Categories
- Price Lists That You Upload
- Online Content Authoring Flow
- Upload Content Authoring Flow
- Sample Item Spreadsheet Upload
- XML: More Catalog Control
- XML Upload Items File Structure
- Uploading Items: Spreadsheet Compared to XML
- Sample XML Administrative Section
- Sample XML Data File Structure
- Sample XML Document Header Section
- Sample XML Document Lines Section
- Sample XML Data Item Section
- Sample XML Data Price Section
- Loading Local Catalog Images
- Sample Uploads for Image Files
- Maintaining Items and Prices
- View Loader Job Status
- View Document Upload History
- Catalogs, Content Zones, And Stores
- iProcurement Catalog Administration: Manage Stores
- Content Zones
- Why Content Zones?
- Creating A Local Content Zone
- Applying Content Security Rules
- Applying Content Security Rules In Stores
- Creating A Punchout Zone
- Creating An Informational Zone
- Creating Smart Forms
- What Are iProcurement Stores?
- Managing Stores
- Remote Catalog Content
- Oracle iProcurement Catalog: Management Review
- Oracle Content Zone Types Review
- What Is Punchout?
- What Is Transparent Punchout?
- Oracle iProcurement Punchout Models
- Quiz
- XML: The Language of a Punchout
- Comparing a Supplier Punchout to a Marketplace Punchout
- Model 1 & 2 Technical Overview
- Models 3 & 4 Technical Overview

- Deciding on a Punchout Model
- Punchout Management
- Basic Punchout Setup Steps
- Oracle Exchange Punchout Setup
- Supplier Punchout Setup
- Administer Oracle iProcurement Catalog Structure
- Catalog Structure Components
- Local Catalog Structure: Categories
- Local Catalog Structure: Items
- Creating and Modifying the Catalog Structure
- Online Schema Maintenance
- XML Upload Schema File Structure
- Sample XML Schema File
- Sample XML Schema Section
- Manage Base Descriptors
- Manage Item Categories
- Managing Descriptors
- Manage Category Hierarchy
- Sample iProcurement Table of
- Map iProcurement Categories
- Map Purchasing Categories
- Shopping Category Mapping
- Uploading Categories and Descriptors
- Catalog Search Components
- Types of Catalog Searches
- Search Results Display: Paragraph or Grid
- Special Characters in Catalog Searches
- Filtering and Sorting
- Search Descriptor Characteristics
- Searchable Base Descriptors
- Search Results Visible Base Descriptors
- Rebuild Catalog Indexes
- Search Engine Setup Impact
- iProcurement Catalog Administration
- Setup Considerations
- Local Catalog Setup
- Profile Options for Uploading Local Content
- Supplier-Hosted Setup
- Marketplace-Hosted Setup
- Profile Options for Punchout
- Decide on a Catalog Source
- Considerations for Local Catalogs
- Considerations for Supplier-Hosted Content
- Considerations for Marketplace-Hosted Content
- Considerations for Security
- Summary

- Objectives
- Procurement Process: Oracle iProcurement
- iProcurement Flow
- iProcurement Home Page
- iProcurement Preferences
- Shop For Goods and Services
- Basic Shopping Flow
- Basic Checkout Flow
- Checkout Step-by-Step
- Review & Submit
- Enter iProcurement Users
- Document Routing Option #1: Employee/Supervisor Relationship
- Document Routing Option #2: Position Approval Hierarchy
- Quiz
- Run Fill Employee Hierarchy Process
- Document Routing Option #3: Oracle Approvals Management
- Give Access to the Users
- My Notifications Region
- Center-Led Procurement
- Set up iProcurement Shopping Defaults
- Oracle Applications Framework
- OAF / iProcurement Personalization
- Setting Up iProcurement Information Templates
- Smart Forms
- Quiz
- Internally Sourced Requisitions Overview
- Internally Sourced Requisitions Details
- Internally Sourced Requisitions Prerequisites
- Change Management for Internal Requisitions
- Services Procurement: Contractor/Service Request
- Oracle Services Procurement
- Services Procurement: Contingent Labor Flow
- Oracle Procurement Feature Comparison
- Requisition Management Actions
- Copying Requisitions
- Canceling Requisitions
- Change / Resubmit Requisitions
- Quiz
- Requisition Statuses
- Requester Change Order
- Requester Change Order Approval
- Procure to Pay Lifecycle Tracking
- Internally Sourced Requisitions Overview
- Internal Requisition Integration

- Internal Requisitions: Setup Requirements
- Internal Requisition Process
- Setting Up Oracle iProcurement Responsibility and Function Security
- Approval and Document Creation
- Automatic Purchase Order Creation
- Automatic Release Creation
- Oracle iProcurement Requisition Approval
- Integration with Oracle Approvals Management
- Workflows Used by Oracle iProcurement
- PO Create Documents Workflow
- Accounting Considerations for Oracle iProcurement
- PO Account Generator Workflow
- Account Creation Overview
- Expense Account Rules
- Tax Calculation
- Grants Accounting and Hazard Information
- Attachments and Special Requisitions
- Procurement Card Support
- Procurement Card Flow - Order
- Quiz
- Procurement Card Flow - Invoice
- Procurement Card Flow - Reconciliation
- Setting Up Credit Card Programs in Oracle Payables
- Code Sets Window
- Card Programs Window
- GL Account Sets Window
- Credit Card Profiles Window
- Credit Cards Window
- Credit Card Workflows
- P-Card Setup for iProcurement
- iProcurement Profile Options
- Notification Routing Rules
- Personalizing the Home Page
- Home Page Logo
- Purchasing News
- Purchasing Policies
- Descriptive Flex Fields In iProcurement
- Requisition Implementation Considerations Checklist
- Important Points to Remember
- Summary

## Oracle iProcurement Receiving

- Objectives
- Procurement Process: Oracle iProcurement
- Key Functionality of Oracle iProcurement

- Oracle iProcurement Receiving
- Overview of Procurement Receiving
- Oracle iProcurement Receipt Routing
- Receiving in Oracle iProcurement
- Quiz
- Receiving Orders in Oracle iProcurement
- Receiving Home Page Functions
- iProcurement Receiving Process
- Quiz
- Finding Your Receipts
- Oracle iProcurement Receiving
- iProcurement Receiving Process
- Entering Returns in Oracle iProcurement
- iProcurement Receiving Process
- Entering Corrections
- Difference Between Returns and Corrections
- Receipt Header in Oracle iProcurement
- Receipt Line in Oracle iProcurement
- The PO Confirm Receipts Workflow
- Purchasing Receiving Setup
- iProcurement Profile Options
- iProcurement Receipt Function Security
- Additional Receiving Considerations
- Receiving Comparison
- Data Mapping Considerations
- Data and Reporting Considerations
- Optional Components
- Receiving Open Interface
- Overview of Payment on Receipt
- Quiz
- Summary

## Oracle iProcurement Setup Steps

- Objectives
- Procurement Process: Oracle iProcurement
- Oracle iProcurement Integration with Oracle Applications Impact on Setup
- Oracle iProcurement Setup Overview
- Quiz
- Oracle Applications Setup Overview
- Oracle Applications Setup Overview - 2
- Oracle Applications Setup Overview - 3
- Oracle Applications Setup Overview - 4
- Oracle iProcurement Setup Overview
- Perform Oracle iProcurement Specific System Administration Setup
- Verify Profile Options That Impact Oracle iProcurement: Oracle Applications
- Verify Profile Options That Impact Oracle iProcurement: Oracle Purchasing

- Verify Profile Options That Impact Oracle iProcurement
- Requisition Templates
- Define Information Templates
- Set Up Catalog
- Additional Implementation Considerations
- Training Considerations
- Oracle iProcurement Features to Consider
- Custom Package Implementation
- Page-Specific Customization
- Quiz
- Summary