

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