(25C) Oracle Fusion Cloud Procurement: Procurement Implementation

Oracle Procurement Cloud

DURATION	MODULES	COURSE CODE
5 Days	**18 Lectures**	**—**

Course Overview

(25C) Oracle Fusion Cloud Procurement: Procurement Implementation

What You Will Learn

Course Introduction

- Learning Objectives
- Introduction to Oracle Fusion Applications Suite
- Oracle Fusion Strategy
- Oracle Fusion Applications Strategy
- One Cloud for Your Entire Business
- Getting Started in Oracle Fusion Applications Suite
- Using the Navigator
- Setting User Preferences
- Work Areas
- Tasks Panel
- Saved Searches
- Task Tabs and Controls
- Configuring Table Columns
- Dialog Window
- Train Stops
- Demonstrations
- Practice
- Summary

Overview of Oracle Fusion Cloud Procurement

- Learning Objectives

- Topics
- Oracle Procurement Overview
- Oracle Procurement Applications
- Oracle Procurement: Applications Ecosystem
- Oracle Procurement: Product Strategy
- Oracle Procurement: Source-to-Settle
- Oracle Procurement: Strategic Procurement
- Sourcing
- Oracle Supplier Qualification Management
- Procurement Contracts
- Oracle Procurement: Transactional Procurement
- Oracle Procurement: Streamlined Procure-to-Pay
- Oracle Procurement: Unified Approval Workflow
- Oracle Supplier Portal
- Oracle Purchasing
- Oracle Transactional Business Intelligence
- The Complete Solution
- Oracle Procurement
- Procurement for Manufacturers
- Procurement Flow
- Oracle Procurement: Setup Flow
- Oracle Procurement: Deployment Environments
- Production Environment
- Nonproduction Environment
- How to Know When Your Oracle Procurement Is Ready
- Resources
- Summary

Introducing Functional Setup Manager

- Learning Objectives
- Topics
- Knowledge Prerequisites
- Key Resources for Prerequisite Knowledge
- What is Functional Setup Manager?
- Offering, Functional Area and Feature Hierarchy
- Streamline Support for Strategic Procurement
- Review Offerings and Prepare to Opt In
- Opt into Offering, Functional Areas, and Features
- Review What’s New and Opt into New Features After Upgrade
- Demonstration
- Practice
- Manage Setup Data with Complete Transparency to Requirements
- Manage Setup Data Using Functional Areas
- Related Setup Tasks
- Tasks with Scope

- Manage Setup Data Using Implementation Projects
- Create an Implementation Project
- Review and Assign Tasks
- Perform Assigned Implementation Tasks
- Practice
- Use Rapid Implementation to Simplify Setup
- Demonstration
- Manage Setup Data Entry in Bulk
- Export and Import CSV Processes
- Practice
- Efficient Setup Data Migration
- Setup Data Key Resources
- Resources
- Summary

Common Application Configuration and Procurement

- Learning Objectives
- Procurement Setup Flow
- Topics
- Common Applications Configuration: Overview
- Demonstration
- The Vision Corporation Story
- Vision Global Enterprise Model
- Defining Enterprise Structures Setup and Maintenance
- Enterprise Structures and Oracle Fusion Applications Suite
- Oracle Fusion Applications Enterprise Structures
- Oracle Fusion Applications Financial Enterprise Structures
- Enterprise Structures: Key Features
- Managing Locations for Procurement
- Manage Locations
- Location Sets
- Enhanced Global Search Framework
- Demonstration
- Reference Data: Overview
- Reference Data Sharing
- Reference Groups
- Determinant Types
- Sharing Supplier Site Reference Data
- Demonstration
- Defining Legal Entities for Procurement
- Legal Entities: Overview
- Defining Business Units for Procurement
- Managing Business Units
- Business Unit Model
- Using Business Units

- Business Unit Considerations
- Business Unit Security
- Business Unit Functions
- Other Business Unit Functions
- Business Unit Hierarchy: Example
- Business Units in the Procure-to-Pay Flow
- Assigning Business Unit Business Function
- Service Provider Model
- Service Provider Model: Example
- Procurement Business Unit Models
- Business Unit Scope in Setup and Maintenance Tasks
- Demonstration
- Inventory Organizations for Procurement
- Managing Inventory Organizations: Overview
- Inventory Organization Usage
- Demonstration
- Resources
- Practices
- Summary

Securing Oracle Procurement

- Learning Objectives
- Topics
- Oracle Fusion Cloud ERP: Security Implementation
- Oracle Fusion Cloud Applications Security Methodology
- Oracle Fusion Applications Security Key Concepts
- Security Reference Implementation
- Defining Data Security
- Practice
- Using Security Console
- Security Console Features Overview
- Practices
- Security Resources
- Summary

Defining and Managing Approvals

- Learning Objectives
- Topics
- Procurement Flow
- Approval Management for Procurement Setup and Maintenance
- Approval Management Foundation
- Approval Management: Overview
- Approval Management: Key Concepts
- Hierarchies and Job Levels
- Requisition Approval Stages

- Task Configurations
- Demonstration
- Managing Approval Groups
- Demonstration
- Approval Management for Procurement Using Approval Rules Setup Interface
- Defining Approval Management Rules for Procurement
- Managing Requisition Approvals
- Set Up Approval Notification Prefixes
- Conditions Using the Procurement Category Hierarchy Top Ten
- User-Defined Attributes
- Currency-Based Attributes
- Summation-Based Attributes
- Standard Attributes
- Troubleshoot Requisition Approvals
- Demonstration
- Practice
- Resources
- Summary

Setting Up Procurement: Common Functions

- Learning Objectives
- Procurement Setup Flow
- Common Procurement Setup and Maintenance
- Common Procurement Topics
- Purchasing Categories and Catalogs
- Using Basic Catalogs
- Common Procurement Topics
- Configuring a Catalog
- Defining Categories to a Catalog
- Defining Default Catalogs
- Procurement Category Hierarchy
- Common Procurement Topics
- Defining Supplier Configuration
- Specifying Supplier Numbering
- Specifying Supplier Lookups
- Defining Lookups
- Demonstration
- Defining Supplier Products and Services Hierarchy
- Demonstration
- Communicate New Supplier Notification and Documents
- Common Procurement Topics
- Defining Procurement Agents
- Common Procurement Topics
- Transaction Accounting for Procurement
- Transaction Account Builder

- Common Procurement Topics
- Defining Payment Terms
- Defining Payment Term Discounts
- Demonstration
- Defining Units of Measure
- Dual Units of Measure
- Dual Units of Measure: Example
- Dual Units of Measure: Item Setup in PIM
- Defining Carriers
- Defining Hazard Classes and United Nations (UN) Numbers
- Defining Freight Lookups
- Setting Purchasing Profile Options
- Managing Procurement Document Numbering
- Configuring Purchasing Tasks
- Purchasing Configuration Setup and Maintenance
- Purchasing Configuration Topics
- Purchasing Document Configuration
- Purchasing Line Types
- Demonstration
- Purchasing Document Styles
- Purchasing Change Order Templates
- Purchasing Document Descriptive Flexfields and Value Sets
- Purchasing Configuration Topics
- Defining Master Items for Purchasing
- Oracle Product Master Data Management
- Purchasing Configuration Topics
- Requisition Flexfields and Value Sets
- Purchasing Configuration Topics
- Defining Business Function Configuration
- Configuring Procurement Business Function – Main Tab
- Procurement Business Function Terms and Conditions
- Configuring Procurement Business Function – Document Types
- Procurement Business Function – Document Types
- Demonstration
- Configuring Requisition Business Function
- Configuring One-Time Addresses
- Managing Common Options for Payables and Procurement
- Financial Options and Procurement
- Default Distributions
- Automatic Offsets
- Automatic Offset by Primary Balancing Segment
- Automatic Offset by All Segments, Except Natural Account
- Currency Conversion
- Expense Accruals
- Self-Billed Invoices
- Demonstration

- Purchasing Configuration Topics
- Buyer Assignment for Requisitions
- Buyer Assignment from Source Agreement
- Manage Buyer Assignment Rules
- Defining Receiving Parameters for Procurement
- Manage Receiving Parameters
- Additional Purchasing-Related Setup
- Set up Transaction Manager to Monitor and Manage Workflow Tasks
- Set Up Access to Transaction Manager
- Transaction Manager Auto-Refresh
- Procurement Business Unit as Shared Service Center
- Shared Service Center Setup Steps
- Procurement by Way of a Subsidiary
- Subsidiary Procurement Setup Steps
- Business-to-Business Messaging
- Oracle Fusion Collaboration Messaging Framework
- Oracle B2B e-Commerce Gateway
- Use Deep Links to Speed Navigation
- Practices
- Resources
- Summary

Suppliers

- Learning Objectives
- Procurement Flow
- Topics
- Oracle Supplier Model
- Supplier Work Area
- Supplier Maintenance
- Supplier Address and Site Maintenance
- Supplier Contact Maintenance
- Prospective and Spend Authorized
- Supplier Mass Update
- Supplier Self Service Profile Management
- Approve Internal Changes on Supplier Profiles
- Approve Internal Changes on Supplier Profiles – Bank Accounts
- Use Approval Rules for Internal Supplier Profile Changes – Bank Accounts
- Approve Internal Changes on Supplier Profiles – Addresses
- Audit Supplier Profile Attribute Changes
- Set Up Auditing Supplier Profile Attribute Changes
- Supplier Customer Party Modeling
- Remove Mandatory Check on D-U-N-S Number, Taxpayer ID, and Tax Registration Number
- Configuring Sender Name and Email in Supplier Management Notifications
- Registering Suppliers
- Smart Data Services for Supplier Addresses

- Inbound Supplier Web Service (Part of SOAP)
- Configurable Automated New Supplier Notification
- Set up New Supplier Notifications with BI Publisher
- Configuring Sender Name and Email in Supplier Management Notifications During Registration
- Oracle Supplier Portal
- Oracle Supplier Portal Functionality
- Oracle Supplier Portal Benefits
- Oracle Supplier Model and Oracle Supplier Portal Setup and Maintenance
- Oracle Supplier Model Setup and Implementation
- Identifying Registration Webpages
- Configuring Registration Webpages
- Oracle Supplier Portal Setup and Maintenance
- Supplier Provisioning
- Create a Supplier User Category – SUPPLIER_USER
- Default Roles
- Provisioning Roles and Setting Defaults
- Additional Oracle Supplier Portal Setup
- Oracle Supplier Model Functionality: Demonstration
- Practices
- Resources
- Summary

Supplier Agreements

- Learning Objectives
- Topics
- Procurement Flow
- Oracle Purchasing
- Purchasing Documents: Key Concepts
- Supplier Agreement: Key Concepts
- Purchase Agreements Overview and Tasks
- Blanket Purchase Agreement: Main Tab
- Blanket Purchase Agreement: Controls Tab
- Blanket Purchase Agreement: Lines
- Blanket Purchase Agreement Line Detail and Price Breaks
- Populate Trading Partner Item Details on Agreements
- Purchase Items That Are Priced in Their Secondary UOM: Purchasing
- Ship-to Organization or Ship-to Location-Specific Price Breaks
- Consignment Agreement
- Demonstration
- Contract Purchase Agreement: Main Tab
- Contract Purchase Agreement: Master Contracts
- Contract Purchase Agreement: Controls Tab
- Controlling Requisition and Line Grouping into Purchase Orders
- Consolidate Online Requisitions into Fewer Purchase Orders
- Generate Separate Purchase Orders by Ship-To Location

- Grouping Imported Requisitions by Various Input Parameters
- Schedule Purchase Order Generation by Supplier Agreement Feature
- Demonstration
- Job Roles and Associated Duty Roles
- Purchase Agreement: Duty Roles and Tasks
- Contract Terms: Duty Roles and Tasks
- Resources
- Practices
- Summary

Procurement Catalogs

- Learning Objectives
- Topics
- Procurement Flow
- Self Service Procurement: Product Overview
- Self Service Procurement Setup and Maintenance
- Managing Self Service Procurement Profile Options
- Managing Information Template Value Sets
- Managing Information Template Descriptive Flexfields
- Demonstrations
- Procurement Catalog Category Hierarchy: Overview
- Category Hierarchy with Catalogs
- Featured Categories
- Demonstration
- Self Service Procurement Maintenance
- Catalog Work Area Tasks
- Supplier Content Map Sets
- Hosting Catalog Images in Oracle Content and Experience
- Demonstration
- Managing Catalogs
- Punchout to Externally-Hosted Catalog and Shopping Sites
- Configure Externally-Hosted Punchout Catalog and Shopping Sites
- Manage Shopping Search Index Synchronization
- Demonstrations
- Managing Public Shopping Lists
- Managing Information Templates
- Demonstration
- Managing Smart Forms
- Smart Forms for the Mid-Market
- Reusing Smart Forms
- Demonstration
- Managing Content Zones
- Display Configurable Contextual Item Details
- Enable Display Configurable Contextual Item Details for a Person or Group
- Demonstrations

- Practices
- Resources
- Summary

Requisitions

- Learning Objectives
- Topics
- Procurement Flow
- Vision Corporation's Requirements
- Oracle Fusion Cloud Self Service Procurement
- Features of Self Service Procurement
- Accessing Self Service Procurement
- Enabling Self Service Procurement
- Requisitioning Catalog Superstore
- Setting Requisition Preferences
- Creating Requisitions
- Managing Requisitions
- My Requisitions
- Procure Goods from Preferred Sources During Catalog Shopping
- Create Requisitions with Item or Category Based Information Templates
- Create Multiple Distributions on Requisitions
- Change Description and Pricing for Catalog Items While Shopping
- Manage Approvers on Requisitions
- Manage Requisitions as Approvers
- Update the Preparer and Requester on Requisitions
- Populate Currency on Requisition Lines Automatically
- Internal Material Transfer
- Implementing Internal Material Transfer
- Supported SCM Flows
- Creating Requisitions to Replenish Consignment Stock
- Search and Select Items Using Item Attributes
- Select a Manufacturing Relationship to Create Requisitions
- Create Requisitions for Inventory Destinations
- Manage Requisitions Created Outside the Self Service Procurement
- Application
- AI Agents
- Demonstration
- Practices
- Resources
- Summary

Purchase Orders

- Learning Objectives
- Topics
- Procurement Flow

- Oracle Purchasing
- Purchase Orders Overview and Tasks
- Purchase Orders Versus Supplier Agreements
- Purchase Order Components
- Purchase Order: Main Tab
- Purchase Order Lines
- Purchase Order Schedules
- Purchase Order Distributions
- Purchase Items That Are Priced in Their Secondary UOM: Purchasing
- Electronic Signature for Purchasing Documents
- Purchasing Document Report
- Purchase Order Life Cycle
- Create Compliance Checklists for Purchasing Documents
- Demonstration
- Purchase Order Creation: Overview
- Create Orders Manually
- Purchase Order Lines with Negative Amounts
- Modifying Existing Purchase Orders
- Process Requisitions
- Purchase Order: Job Roles and Associated Duty Roles
- Purchase Order: Duty Roles and Description
- Change Purchase Order: Feature Highlights
- Common Purchasing Document Change Management
- Independent Change Order Life Cycle
- Configure External or Internal Change
- Comprehensive Audit Trail of Change
- Supplier Acknowledgment of Purchase Orders
- Purchase Order and Change Order Approval Notifications
- Descriptive Flexfield Inheritance between Requisitions and Purchase Orders
- Integration with Supply Chain Management Flows
- Purchasing for Project-Specific Work Orders
- Purchase Orders for Complex Services with Progress Payment Schedules
- Create Work Confirmation for Purchase Orders with Progress Payment
- Schedules
- Item Replacement
- Purchase Request Web Service and Business Events
- Resources
- Practices
- Summary

Self-Service Receiving

- Learning Objectives
- Topics
- Procurement Flow
- Oracle Fusion Cloud ERP

- My Receipts Work Area
- Self-Service Receiving: Key Features
- Self-Service Receiving Process
- Receiving: Receive Items
- Receiving: Create Receipt
- Receiving: Manage Receipts
- Demonstration
- Job Roles and Associated Duty Roles
- Implementation Considerations
- Practices
- Resources
- Summary

Setting Up and Managing Supplier Qualification Management

- Learning Objectives
- Topics
- Supplier Qualification Management
- Business Background: Key Challenges
- Supplier Qualification Management
- Tracking Qualifications for a Supplier
- Identifying Information Needs
- Question Library
- Qualification Areas
- Setup: Overview
- Qualification
- Qualification: Example
- Qualification Initiative
- Internal Surveys
- Supplier Qualification Management Life Cycle
- Integration with Supplier Registration
- Automated Scoring
- Automatic Evaluation
- Event Based Initiative and Qualification Creation
- Automation Errors Resolution
- Supplier Qualification Management: Demonstration
- Supplier Qualification Management Configuration Setup Tasks
- Defining Subject and Standards Organization
- Supplier Qualification Management Configuration Setup Tasks
- Manage Assessment Outcomes
- Supplier Qualification Management Configuration Setup Tasks
- Defining Document Numbering
- Configuring Automatic Search Results Display
- Defining Procurement Agent Security
- Creating a Registration Rule Set
- Set Up Assessment of Supplier Sourcing Eligibility

- Configuring Sender Name and Email in Supplier Qualification Notifications
- Practices
- Resources
- Summary
- Appendix A: Additional Slides of Setup Screens
- Create Question
- Add Translations for the Question Text
- Question Branching
- Mapping to a Supplier Profile Attribute
- Mapping to a Business Classification
- Qualification Area
- Qualification Model
- Appendix B: Additional Slides of Transactional Screens
- Initiatives
- Reviewing and Accepting Responses
- Evaluating Qualifications
- Evaluating Survey Qualifications
- Evaluating Assessments

Setting Up and Managing Sourcing

- Learning Objectives
- Topics
- Oracle Fusion Cloud Procurement
- Oracle Sourcing
- Oracle Sourcing Life Cycle
- Sourcing – Standard for Supplier Negotiations
- Quick Access to All Information
- Easy Negotiation Creation
- Easy Negotiation Attachment Management
- Enhanced Requirement Types
- Add Requirements with Generative AI
- Requirements Spreadsheet
- Question Library
- Negotiation Templates
- Sourcing Negotiation Styles
- Adding and Editing Requisitions to Create a Negotiation
- Enable Large Negotiations
- Manage Supplier Relationships
- Enforcing Supplier Eligibility in Negotiations
- Setting up Supplier Eligibility Enforcement in Negotiations
- Enable Supplier Eligibility Enforcement per BU
- Negotiating Retainage
- Team Scoring
- Supplier Portal
- Requirements Questionnaire

- Online Messages
- Supplier Response Repository
- Supplier Profile
- Surrogate Responses
- Alternate Response Bidding
- Alternate Lines
- Two-Stage RFQ
- Negotiation Monitor
- Sourcing Programs
- Award Analysis
- Negotiation and Award Approvals
- Configure Negotiation Approval Notifications
- Negotiation Abstracts
- Robust Spreadsheet Processing
- Supplier Response Line Upload Setup
- Set up Overall Supplier Response Ranking
- Rank Suppliers Based on the Composite Score
- Deriving Composite Score
- Deriving Composite Score: Example
- Apply Internal Cost Factors in Supplier Negotiations
- Offline Supplier Requirements Scoring with Excel
- Create Supplier Contracts from Negotiation Award
- Control the Create Supplier Contracts from Negotiation Award Process
- Update Blanket Purchase Agreement from Award
- View Negotiation Details for Purchase Orders and Agreements Created as Negotiation Award Outcomes
- Cancel a Negotiation
- Reopen Award Decision after Negotiation is Completed
- Initiate a New Round of Response
- Allow Parent Supplier Access to Negotiations in Supplier Portal
- Configuring Sender Name and Email in Sourcing Notifications
- Seller Negotiations – Seller Auctions
- Seller Negotiations – Submit Bids in Supplier Portal
- Audit Negotiation Changes
- PPM and Sourcing
- Sourcing Project Management
- Sourcing Functionality: Demonstrations
- Sourcing Functionality: Practices
- Sourcing: Setup and Maintenance
- Defining Requirement Sections
- Managing Cost Factors and Cost Factor Lists
- Managing Attribute Groups
- Managing Attribute Lists
- Notification Subscriptions
- Resources
- Summary

- Learning Objectives
- Topics
- Enterprise Contract Management: Foundation
- Procurement Process
- Contracts: Process Flow
- Procurement Contracts: Features and Benefits
- Accessing Contracts from Procurement Applications
- Terminology in the Contracts Application
- Creating Contracts
- Creation Process
- Contract Approval
- Procurement Contracts: Roles
- Implementing Procurement Contracts
- Common Applications Setup Tasks
- Setup Tasks in Enterprise Contracts Setup
- Specify Supplier Contract Management Business Function Properties
- Manage Contract Role Sources
- Manage Contract Risks
- Manage Contract Types
- Manage Contract Request Types
- Manage Contract Line Types
- Performing Contract Terms Library Configuration
- Defining Clause Types
- Setting Up Clauses, Sections, Templates
- Notifying When Contracts are Shared in the Supplier Portal
- Procurement Contracts: Demonstrations
- Procurement Contracts: Practices
- Resources
- Summary
- Appendix A: Authoring Flow Screenshots
- Accessing Enterprise Contracts
- Creating a Contract
- Entering Header Information
- Contract Parties
- Creating Contract Lines
- Creating Lines
- Adding Contract Terms
- Contract Expert
- Contract Expert: Entering Variables
- Contract Expert: Answering Questions
- Checking for Contract Deviations
- Reviewing Contract Deviations
- Submitting for Approval
- Approval Notification

- Approval Notification Details
- Using Contract Wizard

Oracle Fusion Cloud Procurement Integration

- Learning Objectives
- Topics
- Oracle Procurement
- Procurement
- Manage and Automate the P2P Cycle
- Enhance Your Oracle On-Premise Procure-to-Pay
- Integration Options
- Getting Started with Integration
- Getting Started with Integration – Integration Methods
- Oracle Procurement Coexistence Strategies
- Coexistence: Modern Integrated Procure-to-Pay Comprehensive End-to-End Procurement and Payables
- Integration Options – Procure-to-Pay Cloud (P2P)
- Subledger Accounting to General Ledger Integration
- Procure-to-Pay to Accounts Payable Invoice Integration
- Oracle Procurement Coexistence Strategies
- Integration Options – Sourcing
- Demonstration
- Integration Options –Sourcing
- Integration Options – Procurement Contracts
- Reference Data
- Reference Data Integration: Example
- Inbound Supplier Web Service
- Resources
- Summary

Overview of Project-Driven Supply Chain

- Overview of Project-Driven Supply Chain
- Project-Driven Supply Chain
- Features of Project-Driven Supply Chain
- Actions to Use Project-Specific Manufacturing
- Additional Resources