

## R12.2 Oracle Purchasing Fundamentals

This course will be applicable for customers who have implemented Oracle E-Business Suite Release 12 or Oracle E-Business Suite 12.1, Oracle E-Business Suite 12.2

In this course, participants learn how to set up and use R12.2 Oracle Purchasing to manage the purchasing process.

### Learn To

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This course will be applicable for customers who have implemented Oracle E-Business Suite Release 12 or Oracle E-Business Suite 12.1, Oracle E-Business Suite 12.2

The labs/activities have been validated on the 12.2.7 environment.

In this course, participants learn how to set up and use R12.2 Oracle Purchasing to manage the purchasing process. They learn how to create and manage items, suppliers, requisitions, purchase orders, request for quotations, quotations, and receipts. They also learn how to apply document security, routing and approval methods, as well as how to automate the order creation process.

#### Learn To:

- Set up and use Oracle Purchasing
- Apply document security
- Create requisitions and purchase orders
- Apply routing and approval methods
- Enter and manage receipts
- Use the Professional Buyer's Work Center

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### Prerequisites

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### Audience

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- End User
- Implementer

### Course Objectives

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- Create purchase requisitions
- Create standard, blanket and contract purchase documents
- Understand how to use the Auto-Create window, Create Releases program and the PO
- Create Documents Workflow process to automate document creation
- Create Standard, Express, Cascade receipts, Substitute receipts, Returns and Corrections
- Set up Pay on Receipt
- Define document approval and routing process
- Define document security and access levels
- Understand the Period Close process for Purchasing
- Understand Purchasing administration
- Describe how the Purchasing process fits into the Procure to Pay lifecycle
- Define and maintain suppliers
- Use the Professional Buyer's Work-center
- Create request for quotations
- Set up and use an approved supplier list and sourcing rules

## Course Topics

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### Procure To Pay Lifecycle Overview

- Understanding Procure to Pay Lifecycle
- Understanding Oracle Procure to Pay Process

### Oracle Purchasing Overview

- Understanding Purchasing Process
- Requisition to Purchase Order
- Overview of the Ordering Process
- The Receiving Process
- Purchasing Integration

### Enterprise Structure – Locations, Organizations, and Items

- Understanding the Enterprise Structure
- Defining Locations
- Defining Inventory Organizations
- Establishing Inventory Parameters
- Creating Units of Measure
- Creating a Purchasing Category
- Item Attributes Defining and Maintaining Items
- Describing and Using Category Sets

### Suppliers

- Overview of Suppliers
- Entering Supplier Information

- Defining Supplier Site Information
- Managing Suppliers
- Running Supplier Reports
- Understanding Financial Options
- Defining Supplier Profile Options

## **RFQs and Quotations**

- Request for Quotation Lifecycle
- Creating and Maintaining Requests for Quotation
- Creating a Supplier List
- Understanding Quotations Lifecycle
- Creating and Maintaining Quotations
- Sending Notifications
- Defining RFQ and Quotations Profile Options

## **Approved Supplier Lists and Sourcing Rules**

- Creating Approved Supplier Lists
- Understanding Supplier Statuses
- Understanding Supplier-Commodity/Item Attributes
- Understanding ASL Precedence
- Defining Sourcing Profile Options for Approvals

## **Requisitions**

- Understanding the Requisition Lifecycle
- Notifications
- Requisition Structure
- Creating and Maintaining Requisitions
- Supplier Item Catalog
- Creating Requisition Templates
- Running Requisition Reports
- Defining Requisition Profile Options

## **Purchase Orders**

- Understanding Purchase Order Types
- Purchase Order Components and Record Structure
- Creating Standard Purchase Orders
- Creating Contract Purchase Agreements
- Revising Purchase Orders
- Maintaining Purchase Orders
- Identifying Key Reports
- Creating Global Agreements

## **Automatic Document Creation**

- Understanding AutoCreate
- Creating Purchase Documents from Requisitions

- Modifying Requisition Lines
- Running the Create Releases Program
- Understanding the PO Create Documents workflow

## **Receiving**

- Receiving Locations
- Receipt Routing
- Receipt Processing Methods
- Receiving Tolerances
- Entering Returns and Corrections
- Overview of Pay on Receipt
- Running Reports
- Defining Profile Options

## **Professional Buyer's Work Center**

- Learning Business Benefits of the Buyer's Work Center
- Understanding Requisitions in the Buyer's Work Center
- Creating a Purchase Order in the Buyer's Work Center
- Purchase Agreements in the Buyer's Work Center
- Creating a Personalized Requisition View
- Understanding Implementation Considerations
- Using Document Styles
- Creating a Purchase Agreement in the Buyer's Work Center