

## R12.x Oracle Purchasing Fundamentals

**Duration:** 5 Days

### What you will learn

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

In this course, participants learn how to set up and use R12.x 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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### Audience

End Users  
Functional Implementer  
Technical Consultant

### Related Training

#### *Required Prerequisites*

Thorough knowledge of Oracle Applications

Working experience with procurement

#### *Suggested Prerequisites*

R12.x Oracle E-Business Suite Essentials for Implementers

### Course Objectives

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

### **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

### **Document Security, Routing and Approval**

Document Security and Access Levels  
Document Approval - Jobs and Positions  
Creating Position Approval Hierarchies  
Defining Document Security Levels  
Creating Approval Groups  
Defining Document Access Levels  
Using Oracle Workflow for Requisitions and Purchase Order Approvals  
Running the Fill Employee Hierarchy Process

### **Purchasing Accounting**

Overview of Purchasing Accounting  
Closing the PO Period  
Using foreign currency  
Purchasing Accounting Implementation Considerations  
Setup options  
Accrual Reconciliation Process

### **Setup Steps**

Setting Up Document Sequences  
Setting Up Key Profile Options  
Setting Up Descriptive Flexfields  
Defining Purchase Order Matching and Tax Tolerances  
Defining Approval Groups and Assignments  
Defining Purchasing Options  
Setting Up Sourcing Rules and Assignments  
Performing Additional System Administration

### **Purchasing Administration**

Maintaining Oracle Purchasing Database Records  
Using Mass Update on Purchasing Documents  
Using Purchasing MassCancel  
Using Mass Close of Purchasing Documents  
Understanding Purge  
Running the Purchasing Concurrent Processes