R12.x Oracle Purchasing Fundamentals

Duration: 5 Days

What you will learn

This course is ideal for those who have implemented Oracle E-Business Suite Release 12 or Oracle E-Business Suite 12.1. You'll learn how to set up and use R12.x Oracle Purchasing to manage the purchasing 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.

Additional Course Topics

This course will also teach you how to create and manage items, suppliers, requisitions, purchase orders, request for quotations, quotations and receipts. Learn to apply document security and routing and approval methods, along with automating the order creation process.

Audience

End Users

Functional Implementer

Technical Consultant

Related Training

Required Prerequisites

Thorough knowledge of Oracle Applications

Working experience with procurement

Suggested Prerequisites

Aspectos Esenciales de Oracle eBusiness Suite R12.x para Implementadores

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