Module: Oracle Purchasing

You will learn how to set up and use Oracle Purchasing to manage the purchasing process

Mode: Classroom

Duration: 32 hours – regular weekend and fast-track courses available

Pre-requisite:
- Understanding of standard Finance Processes
- Overview of Oracle Applications
- Oracle E-Business Suite Essentials for Implementers

Course Topics

Understanding Procure To Pay and Purchasing Lifecycle Overview
- Understanding Procure to Pay Lifecycle
- Understanding Purchasing Process
- Purchasing Integration

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

Suppliers
- Overview of Suppliers
- Managing Supplier and Supplier Site Information
- Running Supplier Reports
- Understanding Financial Options and defining Supplier Profile Options

RFQs and Quotations
- Request for Quotation Lifecycle
- Creating and Maintaining Requests for Quotation and creating a Supplier List
- Understanding Quotations Lifecycle including 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, Supplier-Commodity/ Item Attributes
- Understanding ASL Precedence
- Defining Sourcing Profile Options for Approvals

Requisitions
- Understanding the Requisition Lifecycle
- Requisition Structure and creating and Maintaining Requisitions

- Supplier Item Catalog and creating Requisition Templates
- Defining Requisition Profile Options and Running Requisition Reports

Purchase Orders
- Understanding Purchase Order Types
- Purchase Order Components and Record Structure
- Creating different types of Purchase Orders – Standard, Contract, Blanket etc
- Maintaining Purchase Orders and Identifying Key Reports
- Creating Global Agreements

Automatic Document Creation
- Understanding AutoCreate function
- Creating Purchase Documents from Requisitions
- Modifying Requisition Lines and running the Create Releases Program
- Understanding the PO Create Documents workflow

Receiving
- Receiving Locations and using Tolerances
- Receipt Routing and Processing Methods
- Entering Returns and Corrections
- Defining Profile Options

Professional Buyer's Work Center
- Working with Buyer's Work Center - Business Benefits, Creating Requisitions and POs
- Purchase Agreements in the Buyer's Work Center
- Creating a Personalized Requisition View
- Understanding Implementation Considerations and 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 and defining Document Security Levels
- Creating Approval Groups and defining Document Access Levels
- Using Oracle Workflow for Requisitions and Purchase Order Approvals

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

Setup Steps
- Setting Up Document Sequences
- Setting Up Key Profile Options, Purchasing Options and Descriptive Flexfields
- Defining Purchase Order Matching and Tax Tolerances
- Defining Approval Groups and Assignments and 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 and Mass Close of Purchasing Documents
- Understanding Purge and running the Purchasing Concurrent Processes