

# **Oracle® iProcurement**

Implementation Guide

Release 11*i*

**Part No. A85361-04**

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Oracle iProcurement Implementation Guide, Release 11i

Part No. A85361-04

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# Send Us Your Comments

**Oracle iProcurement Implementation Guide, Release 11i**

**Part No. A85361-04**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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If you have problems with the software or documentation, please contact your local Oracle Support Services.



## Audience for This Guide

Welcome to Release 11i of the Oracle iProcurement Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Implementing ERP Applications.
- Oracle® iProcurement

If you have never used Oracle iProcurement 11*i*, we suggest you attend one or more of the Oracle iProcurement 11*i* training classes available through Oracle University.

See Other Information Sources for more information about Oracle Applications product information.

## How To Use This Guide

This guide contains the information you need to understand and use Oracle iProcurement 11*i*.

**Chapter 1** Provides a brief overview of the features in Oracle iProcurement 11*i*. See: "[Overview](#)" on page 1-1.

**Chapter 2** Describes the implementation steps specific to Oracle iProcurement 11*i*. See: "[Oracle Application Setup](#)" on page 2-1.

**Chapter 3** Presents the various methods available for extracting and loading catalog data such as the Define Catalog Server Loader Values window of Oracle Purchasing and the catalog data extraction concurrent programs. See: "[Catalog Management](#)" on page 3-1.

**Chapter 4** Describes the implementation of requisition related features used by Oracle iProcurement 11*i*. See: "[Requisitions](#)" on page 4-1.

**Chapter 5** Presents the various features used for receiving ordered goods in Oracle iProcurement 11*i* and discusses setup implications. See: "[Receipts](#)" on page 5-1.

**Appendix A-E** Provides detailed information on specific subjects related to Oracle iProcurement 11i.

## Conventions

The following conventions are used in this guide:

Convention	Meaning
. . . . . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
. . .	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

## Documentation Accessibility

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<http://www.oracle.com/accessibility/>

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JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

## Accessibility of Links to External Web Sites in Documentation

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## Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle iProcurement 11*i*.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

## Online Documentation

All Oracle Applications documentation is available online (HTML).

- **Online Help** - Online help is available for Oracle iProcurement 11*i* and Catalog Authoring. No paper user guides are available. Online help patches are available on MetaLink.
- **11*i* Features Matrix** - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.
- **Readme File** - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

## Related User's Guides

Oracle iProcurement 11*i* shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user's guides when you set up and use Oracle iProcurement 11*i*.

You can read these guides online by choosing Library from the expandable menu on your Oracle Applications HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at:

<http://oraclestore.oracle.com>.

## Guides Related to All Products

### **Oracle Applications User's Guide**

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Applications products. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online (in Oracle Applications products) by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

## User Guides Related to This Product

### **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup, and reference information for the Oracle Purchasing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

### **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

### **Oracle Applications User's Guide**

This guide explains how to navigate the ERP applications system, enter data, and query information, and introduces other basic features.

### **Oracle e-Commerce Gateway User's Guide, Release 11i**

This guide describes how Oracle e-Commerce Gateway provides a means to conduct business with trading partners via Electronic Data Interchange (EDI). Data files are exchanged in a standard format to minimize manual effort, speed data processing and ensure accuracy.

### **Oracle eTechnical Reference Manuals (eTRM), Release 11i**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific

Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle MetaLink (<http://metalink.oracle.com>).

### **Oracle Internet Procurement Installation Guide**

Presents information necessary for installation.

### **Oracle Payables User's Guide, Release 11i**

This guide describes how accounts payable transactions are created and entered in Oracle Payables. This guide also contains detailed setup information for Oracle Payables.

### **Oracle Purchasing User's Guide, Release 11i**

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

### **Oracle Self-Service Web Applications Implementation Manual, Release 11i**

This manual contains essential information if you are implementing iProcurement 11i on Oracle Applications Release 11i.

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**Note:** The Web Applications Dictionary is documented within the *Oracle Self-Service Web Applications Implementation Manual*.

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### **Oracle Workflow Guide, Release 11i**

Oracle Workflow enables you to automate and continuously improve business processes. Information of any type can be routed according to business rules.

## **Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange, Release 11*i***

This document contains necessary information for customers implementing Oracle Exchange as a third party catalog service and customers implementing remote catalog content from a supplier.

## **Documentation Updates**

For Oracle Applications products, documentation updates and patch documents are available on Oracle MetaLink. Check the following areas on Oracle MetaLink for documentation updates and / or patch documents relevant to iProcurement 11*i*:

- Oracle ERP - iProcurement
- Oracle ERP - Exchange
- Oracle ERP - Purchasing
- Oracle Financials - Payables

Additional updates may be added to MetaLink at any time. Updates for products other than those listed here may also be relevant. The MetaLink web site is:

<http://metalink.oracle.com>

## **Installation and System Administration**

### **Oracle Applications Concepts**

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your

installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

### **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

### **Maintaining Oracle Applications**

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

### **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

### **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

### **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

## Other Implementation Documentation

### **Oracle Applications Product Update Notes**

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

### **Multiple Reporting Currencies in Oracle Applications**

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle iProcurement 11*i*. This manual details additional steps and setup considerations for implementing Oracle iProcurement 11*i* with this feature.

### **Multiple Organizations in Oracle Applications**

This guide describes how to set up and use Oracle iProcurement 11*i* with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle iProcurement 11*i*.

### **Oracle Workflow Administrator's Guide**

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

### **Oracle Workflow Developer's Guide**

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

### **Oracle Workflow User's Guide**

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

### **Oracle Workflow API Reference**

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

## **Oracle Applications Flexfields Guide**

This guide provides flexfields planning, setup and reference information for the Oracle iProcurement 11i implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

## **Oracle eTechnical Reference Manuals**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

## **Oracle Manufacturing APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes API's and open interfaces found in Oracle Manufacturing.

## **Oracle Order Management Suite APIs and Open Interfaces Manual**

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes API's and open interfaces found in Oracle Order Management Suite.

## **Oracle Applications Message Reference Manual**

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

## **Training and Support**

### **Training**

Oracle offers a complete set of training courses to help you and your staff master Oracle iProcurement 11i and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for

our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

## **Support**

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle iProcurement 11i working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

## **Do Not Use Database Tools to Modify Oracle Applications Data**

*Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

## Your Feedback

Thank you for using Oracle iProcurement 11*i* and this guide.

Oracle values your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or dislike about this guide. Send electronic mail with your comments to [mfgdoccomments@oracle.com](mailto:mfgdoccomments@oracle.com).



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## Overview

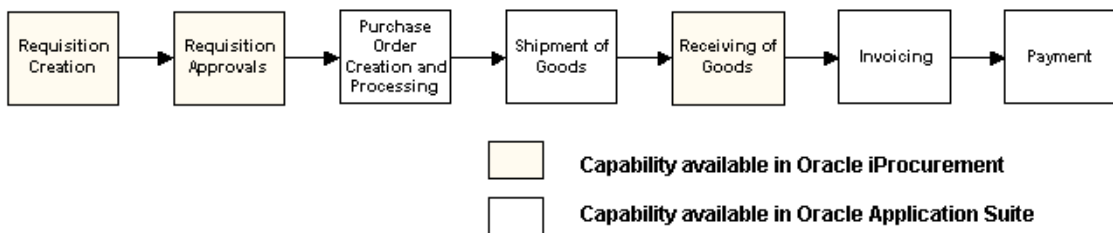
Oracle iProcurement 11*i* enables internal corporate requesters to independently order items from both local (internal) and remote (external) catalogs. Oracle iProcurement 11*i* is fully integrated with Oracle Applications Release 11*i*. This guide includes five chapters:

- iProcurement Overview - An overview of Oracle iProcurement 11*i*.
- Oracle Application Setup - Setup steps in Oracle Applications for iProcurement.
- iProcurement Catalog Management - Catalog setup steps.
- iProcurement Requisitions - Setup steps for requisitioning.
- iProcurement Receipts - Setup steps for receiving.

## 1.1 Oracle iProcurement in Procure-to-Pay Flow

Oracle iProcurement is part of Oracle Applications, an integrated suite of E-Business solutions designed to transform your business into an E-Business. Along with the rest of the Oracle E-Business suite, iProcurement helps an enterprise streamline the procurement process with end-to-end business automation. It is the starting point for the ordering process and provides powerful self-service requisitioning capability with an intuitive, web shopping interface. It constitutes a key component of the complete procure-to-pay business flow and helps an enterprise to process and manage requisitions and receipt of the requested goods/services in an efficient and automated manner.

**Figure 1–1 Procure-to-Pay Flow**



In this overview of Oracle iProcurement we will discuss the following components of the product:

- [Catalog and Content Management](#)
- [Shopping](#)
- [Checkout](#)
- [Requisition Tracking and Management](#)
- [Desktop Receiving](#)

## 1.2 Catalog and Content Management

Oracle iProcurement 11*i* offers a flexible solution to catalog and content management, enabling you to select from several approaches based on your business model.

1. Load catalogs directly into the Oracle iProcurement catalog using the catalog bulk loader, which supports catalogs formatted in XML, standard text, catalog interchange format (CIF), or cXML. Using the catalog bulk loader, you can load new catalogs, update existing catalogs, and delete catalog content. Oracle iProcurement 11*i* also supports catalogs created in multiple languages and currencies to support requester communities worldwide, respecting their cultural backgrounds.
2. Use the catalog extractor to load items and services from Oracle Purchasing into the iProcurement catalog.
3. Punchout to an Oracle Exchange marketplace, such as Exchange.Oracle.com, or a supplier's Web store to access their catalogs. This punchout can be a direct link to the store, where the requester searches, shops, and returns items to Oracle iProcurement. Alternatively, you and the supplier can set up a transparent punchout that works in the background to return matching items from the external site directly to the requester's search results.
4. Use informational catalogs, which contain instructions or links for ordering other items or services at your company. The informational catalog enables Oracle iProcurement to be your company's portal for all ordering.

You can use any or all of these approaches for creating catalog content. See [Chapter 3](#) for complete information.

## 1.3 Shopping

Oracle iProcurement 11*i* leverages the well accepted model for web shopping incorporated into top consumer websites. This proven approach allows first time, untrained requesters to find desired items or services (shop) and create requisitions (checkout), while also catering to experienced requesters by providing increased control and flexibility when creating requisitions.

Figure 1–2 Shopping Home Page

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

### Shop

**My Favorite Store**

Office Supplies  
Office supplies  
Search Office Supplies

**Other Stores**

**Computer Supplies**  
Computer hardware and supplies

**Wireless**  
Phones, pagers & services

**Gifts and Promotional Items**  
Gifts for customers

**Travel**  
Hotels, flight tickets, cars

**Legal Services**  
Immigration, contract review

**Industrial Supplies**  
Lightweight industrial related products

**Shopping Cart**

You have saved carts.  
[Click here to view your saved carts.](#)

**Purchasing News**

✓ [Check frequently asked questions](#)  
✓ [Review purchasing policies](#)

March 6, 2000.

This is where the customer puts their own purchasing news items (this is an HTML plugin).

**Catalog Language**

Your current catalog language: American English  
[Change Catalog Language](#)

✓ **TIP** Can't find the item? Try the following options:  
[Browse Categories](#)  
[Browse My Favorites List and Other Shopping Lists](#)  
[Create a Non-Catalog Request](#)

### Manage Requisitions

**Requisitions at a Glance**

Requisition	Description	Status
10650	folders	Approved
10649	paper	Approved
10648	pens	Approved
10647	printer paper	Approved
<a href="#">More...</a>		

**To-Do List**

Going Away? [Click here to reassign your notifications.](#)

- RFQ 14233 requires your approval

Shop | Requisition Status | Receiving | My Profile | Return to Portal | Shopping Cart | Help | Diagnostics  
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## 1.3.1 Stores

Oracle iProcurement employs the concept of stores. Using stores, organizations can define an intuitive collection of their content areas. Stores can be configured to include any combination of local catalogs, punchout catalogs, information catalogs and transparent punchout catalogs.

For most organizations, restricting access to content by role is very important. After configuring catalogs and stores, administrators can easily control which are available to different classes of requesters within the employee population.

## 1.3.2 Powerful Search Capabilities

The powerful search capabilities of Oracle iProcurement 11i provide support to all levels of requesters—from the casual requester browsing for items to the focused requester searching for specific products. Oracle iProcurement requesters search the catalog by entering natural language text descriptions to quickly and easily find the desired items or services. Requesters are not required to know the details of a classification format or catalog hierarchy—they simply enter search criteria ranging from partial item descriptions to part numbers and supplier name to specific product attributes (such as color or size). Using Oracle interMedia's state-of-the-art technology, the search returns a list of matching items. Additional search capabilities such as comparing, sorting, filtering, and advanced search enable requesters to further refine their search.

As an alternative to performing searches, requesters can browse through the hierarchy of categories within the catalog to locate items and services. This is particularly effective when the requester is familiar with the classification of the items.

See [Appendix D](#) for detailed and complete information on searching.

### **Standard (or Quick) Search**

Standard search looks across all the searchable descriptors for records that match all of the entered search keywords.

### **Expanded Search**

If no results are returned from performing a standard search, requesters can find more approximate matches by using expanded search.

### **Advanced Search**

Advanced search enables requesters to search by specific item descriptors, such as item description, supplier, manufacturer, or price. Requesters can use advanced search operators such as *with at least one of the words* or *with the exact phrase* to search for items that match a particular description, manufacturer, and price, or other combination.

## 1.3.3 Shopping Lists

Requesters can access frequently ordered items through the use of shopping lists.

**Favorite Lists**

Requesters can create their own personal favorites list for the items they most frequently order.

**Public Lists**

Professional buyers in Oracle Purchasing can use requisition templates to create public lists that can be accessed by requesters.

**1.3.4 Saved Carts**

Requesters can save an unlimited number of shopping carts in progress. This enables you to save selected items and return later to add more items and checkout.

**1.3.5 Non-Catalog Requests**

You can also request items and services not found in the catalog or shopping lists by creating non-catalog requests.

Services can be included in the catalog or can be entered as non-catalog requests. When creating a non-catalog request, you can enter rate-based services, such as temporary services based on hourly rates, or fixed-amount based services for contracted events.

**1.3.6 Enhanced Automatic Document Creation**

Oracle iProcurement 11i supports several different supplier level document types to enable the automated document creation process. Supplier purchase contracts and quotations can be used to generate standard purchase orders. Supplier blanket purchase agreements can be used to create releases. All three of these support purchasing document creation without requiring buyer intervention.

**1.3.7 Internally Sourced Items**

In a buying organization, goods are sourced either from external suppliers or from internal inventory and warehouse locations. In Oracle iProcurement, externally sourced items are requested using purchase requisitions and items sourced from an internal source are requested using internal requisitions. Internal requisitions are not converted into purchasing documents (purchase orders, blanket releases, and so forth). Rather, internal requisitions are converted into internal sales orders. These internal sales orders are subsequently processed and then the requested items can be received in Oracle iProcurement.

## 1.4 Checkout

### 1.4.1 Checkout Types

Once items have been added to the cart, requesters have three options to complete the requisition process. Regardless of the checkout option selected, at the end of each checkout a requisition is submitted.

#### **Standard Checkout**

This step-by-step checkout flow is designed for new requesters and includes all of the following steps: Shopping, Delivery, Billing, Notes, Approvers, and Review/Submit.

#### **Power Checkout**

Designed for frequent requesters that often make changes, power checkout provides the ultimate item-level control and flexibility.

#### **Express Checkout**

Designed for repeat requesters, express checkout abbreviates the required screens by using delivery and billing information derived from a requester's defaults defined in their profile.

### 1.4.2 Delivery

#### **Multiple Destination Types**

You can use Oracle iProcurement 11i to create requisitions for requester-initiated inventory replenishment requests, such as stocking a shop floor crib. Alternatively, requested items can be delivered to an expense destination.

#### **One Time Addresses**

There are occasions where requesters want items delivered to a location that is not an office location or other pre-defined location established in the database. This is considered a one time address and can be defined as a deliver to location during the requisition creation process.

### **Integration to EAM**

Oracle Enterprise Asset Management (EAM) is an Oracle Applications module that identifies, schedules and tracks all work activity/costs related to assets throughout an organization. Oracle iProcurement requisitions update EAM work orders.

## **1.4.3 Billing**

### **Multiple Account Distributions and Account Generation Workflow Integration**

Charge accounts for requisition lines are generated using Account Generator Workflow rules. You can split charges for requested items across multiple accounting codes, allowing multiple departments or account to bear the cost of items on a single requisition line. This eliminates the need to create multiple requisition lines when the same item is being requested for multiple departments.

### **Procurement Card Purchases**

Oracle iProcurement 11i automatically flags shopping cart lines for procurement card (P-Card) payment and defaults the P-Card number depending on the requester and supplier profiles. Two separate types of P-Cards are supported:

- **Employee P-Cards:** Companies maintain a separate employee P-Card for each requester in the company to make purchases.
- **Supplier P-Cards:** Companies maintain a single supplier P-Card for each supplier/supplier site in the system to consolidate all purchases from that supplier/supplier site.

After a requisition has been created and approved, a purchase order containing the P-Card number is created and communicated to the supplier. A P-Card reconciliation process provides the capability to electronically reconcile the P-Card statements and the corresponding purchase orders in the buyer's purchasing application.

### **Oracle Projects Integration**

Integration with Oracle Projects and Oracle Project Manufacturing enables requesters to optionally reference project and task related information on shopping cart order lines.

### **Oracle Grants Integration**

Integration with Oracle Grants enables requesters to optionally reference projects, tasks, and awards related information on shopping cart order lines.

### **Encumbrance Support**

For customers using budgetary controls, Oracle iProcurement provides the ability to check funds on-line before submitting requisitions. If a request carries costs past their budgetary limit, the requester is informed and can take appropriate action. Funds are automatically reserved during the requisition submit process.

### **Tax Integration**

Oracle iProcurement 11i enables you to specify tax information including taxable status and tax code, if applicable. This tax information is carried forward to the purchasing document.

## **1.4.4 Notes and Attachments**

### **Notes**

During checkout requesters can include notes to buyers and approvers. These notes can be viewed by their intended recipients later in the procurement process.

### **Upload and View Attachments**

You can provide additional information to approvers, buyers, suppliers and receivers by attaching text, URLs, and other file types to the requisition. These attachments can be transferred through the system to purchase orders, blanket releases and receipts.

## **1.4.5 Approvers**

### **Approval Routing Configuration**

Oracle iProcurement 11i enables the configuration of the list of approvers for a specific requisition at the time of submission. The Oracle Approval Manager workflow determines who needs to approve the requisition. This workflow can be customized to meet your business needs. The requester can also add approvers and re-sequence the list to meet specific needs. The general approval list is built based on approval rules defined during the application setup.

## 1.5 Requisition Tracking and Management

After the requester has created and submitted a requisition, the requester can quickly and easily track further processing of the requisition using the Oracle iProcurement application.

### **Requisition Tracking**

The requester receives real-time notifications to keep the requester up-to-date with actions taken against the requisition. Requesters can optionally launch enhanced queries to gain additional intelligence and insight into the progress of their requisitions.

### **Requisition Management**

If there are changes to be made to an existing requisition, the requester has the capability to withdraw the requisition, make the necessary changes and resubmit it, or if the original request for the goods/services is no longer valid, the requester can simply cancel the original requisition. Requesters can also submit a request for changes to the purchase order created from their requisitions.

### **Requisition Approval Routing**

Oracle iProcurement provides flexibility in streamlining the approval process:

- **Vacation Scheduling:** Approvers can indicate dates of planned absence and specify proxy approvers for their notifications, eliminating potential bottlenecks in the approval process.
- **Approval Manager workflow** can reassign, forward, or request more information during the approval process.
- **Approver checkout:** When the requisition goes to the approver for approval, the approver can also make changes to the requisition before approving it.

## 1.6 Desktop Receiving

In Oracle iProcurement requesters can receive items, return items, correct items that have been previously received, and view their receiving transaction history.

**ORACLE**  
iProcurement

Return to Portal | Shopping Cart | Help

Shop | Requisition Status | **Receiving** | My Profile

Search: Items to Receive | Find by Requisition Number | [ ] | Go

### Receiving

Select the receiving action you want to perform.

- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

#### Requisitions to Receive

Click **Receive** to create receipt(s) for the items on the requisition. Full List

Requisition	Requisition Description	Supplier	Order Number	Receive
559		GE Plastics	501	
558		GE Plastics	501	
557		GE Plastics	501	
555		GE Plastics	501	
552		GE Plastics	501	

#### My Receipts at a Glance

Click **View Details** to view receipt details. Full List Previous Next

Receipt	Item Description	Receipt Date	Transaction Date	Supplier	View Details
No data exists.					

#### Receiving Process

- Receive**  
Record receipt of the items you ordered, or receive on behalf of others.  
[Receive Items](#)
- Return**  
Need to send items back to the supplier?  
[Return Items](#)
- Correct**  
Did you record the wrong receipt quantity?  
[Correct Receipts](#)
- View**  
View receipts with all associated returns and corrections.  
[View Receipts](#)

Shop | Requisition Status | **Receiving** | My Profile | Return to Portal | Shopping Cart | Help

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### Receive

Requesters can receive internally and externally sourced items or the entire requisition from their desktop. Receipts can be created for a single item with a single click by using the Express Receive feature. Requesters can optionally enter additional information like packing slip number, waybill/airbill number, and comments using regular receiving. Oracle iProcurement supports *Blind Receiving*, where a receiver is not given visibility of the quantity ordered, quantity already received, or the tolerances that have been set-up.

**View Shipments**

Oracle iProcurement requesters can view supplier advanced shipment notices (ASN) as well as internal shipments. Shipment information defaults into the receipt while receiving items.

**Return**

Oracle iProcurement allows the receiver to return items to suppliers. The receiver can also create debit memos during the return process.

**Correct**

Oracle iProcurement allows the receiver to make corrections to the quantity received on receipts that have already been processed.

**Receipt Confirmation**

Oracle iProcurement also provides a workflow-driven receipt confirmation mechanism that proactively sends a notification to requesters to confirm receipt on the due date.



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# Oracle Application Setup

This chapter describes the technical implementation steps specific to Oracle iProcurement 11i that would be performed by a DBA, system administrator, or technical implementation team member. These steps are completed in the Oracle Application framework and include the following topics:

- [Prerequisites](#) on page 2-2
- [Profile Options](#) on page 2-8
- [Administration](#) on page 2-28
- [Security](#) on page 2-34
- [AK Regions](#) on page 2-44
- [Technology Stack Upgrade](#) on page 2-52
- [Workflow](#) on page 2-53
- [Custom Packages](#) on page 2-58
- [Online Help](#) on page 2-63

## 2.1 Prerequisites

The following table lists the prerequisite setups necessary to implement Oracle iProcurement 11i. These steps may have been completed if you have already implemented Oracle Purchasing 11i. See *Setting Up* in the *Oracle Purchasing User's Guide* for more information.

**Table 2–1 Setup Steps**

No.	Step	If Oracle Purchasing is setup	If Oracle Purchasing is not setup	Information Source
1	Set Up System Administrator	Not Required	Required	Oracle Applications System Administrator's Guide
2	Define Accounting Key Flexfields	Not Required	Required	Oracle Applications Flexfields Guide
3	Set Up Calendars, Currencies, and Set of Books	Not Required	Required	Oracle General Ledger User's Guide
4	Define Human Resources Key Flexfields	Not Required	Required	Oracle Applications Flexfields Guide
5	Define Locations	Not Required	Required	Configuring, Reporting and System Administration in Oracle HRMS
6	Define Organizations and Organization Relationships	Not Required	Required	Configuring, Reporting and System Administration in Oracle HRMS
7	Convert to a Multi-Org Architecture	Not Required	Optional	Multiple Organizations in Oracle Applications
8	Define Inventory Key Flexfields	Not Required	Required	Oracle Applications Flexfields Guide
9	Define Units of Measure	Not Required	Required	Oracle Inventory User's Guide
10	Define Freight Carriers	Not Required	Optional	Oracle Inventory User's Guide
11	Define Item Attributes, Codes and Templates	Not Required	Required	Oracle Inventory User's Guide

**Table 2-1 Setup Steps**

<b>No.</b>	<b>Step</b>	<b>If Oracle Purchasing is setup</b>	<b>If Oracle Purchasing is not setup</b>	<b>Information Source</b>
12	Define Categories	Not Required	Required	Oracle Inventory User's Guide
13	Enable Categories for Oracle iProcurement	Required	Required	Catalog Management section in this guide
14	Set Up Employees	Not Required	Required	Configuring, Reporting and System Administration in Oracle HRMS
15	Set Up Oracle Workflow	Not Required	Required	Oracle Workflow Guide
16	Decide How to Use the Account Generator	Not Required	Required	Oracle Workflow Guide Oracle Purchasing User's Guide
17	Open Inventory and Purchasing Accounting Periods	Not Required	Required	Oracle Inventory User's Guide Oracle Purchasing User's Guide
18	Define Subinventory Locations	Not Required	Optional	Oracle Inventory User's Guide
19	Define Cross-Reference Types	Not Required	Optional	Oracle Inventory User's Guide
20	Define Tax Codes	Not Required	Optional	Oracle Payables User's Guide
21	Define Payment Terms	Not Required	Optional	Oracle Payables User's Guide
22	Set Up Approval Structure	Not Required	Required	Oracle Purchasing User's Guide
23	Define Lookups and Classes	Not Required	Required	Oracle Inventory User's Guide
24	Define Standard Attachments	Not Required	Optional	Oracle Applications Guide

**Table 2–1 Setup Steps**

<b>No.</b>	<b>Step</b>	<b>If Oracle Purchasing is setup</b>	<b>If Oracle Purchasing is not setup</b>	<b>Information Source</b>
25	Define Purchasing Options	Not Required	Required	Oracle Purchasing User's Guide
26	Define Buyers	Not Required	Required	Oracle Purchasing User's Guide
27	Define Items	Not Required	Optional	Oracle Inventory User's Guide
28	Define Line Types	Not Required	Required	Oracle Purchasing User's Guide
29	Start the Purchasing Database Administrator	Not Required	Required	Oracle Purchasing User's Guide
30	Define Financial Options	Not Required	Required	Oracle Payables User's Guide
31	Define Transaction Reasons	Not Required	Optional	Oracle Purchasing User's Guide
32	Define Receiving Options	Not Required	Required	Oracle Purchasing User's Guide
33	Set Up Transaction Managers and Resubmission Intervals	Not Required	Required	Oracle System Administrator's Guide
34	Define Suppliers	Not Required	Required	Oracle Payables User's Guide
35	Set Up Workflow Options	Not Required	Required	Oracle Workflow
36	Submit Workflow-related Processes	Not Required	Required	Oracle Purchasing User's Guide
37	Define Descriptive Flexfields	Not Required	Optional	Oracle Applications Flexfields Guide

**Table 2–1 Setup Steps**

<b>No.</b>	<b>Step</b>	<b>If Oracle Purchasing is setup</b>	<b>If Oracle Purchasing is not setup</b>	<b>Information Source</b>
38	Set Up Automatic Sourcing	Not Required	Optional	Oracle Purchasing User's Guide
39	Perform Additional System Administrator Setup	Not Required	Required	Oracle System Administrator's Guide
40	Define Manufacturing System and requester Profiles	Not Required	Required	Oracle System Administrator's Guide

## 2.2 Setup Steps: Specific to Oracle iProcurement Features

The following table lists the setup step specific to implementing optional features of Oracle iProcurement 11i. These steps may have been completed if you have already implemented Oracle Purchasing 11i.

**Table 2–2 Oracle iProcurement Specific Setup Steps**

Step	Required or Optional	Information Source
Define Requisition Templates for iProcurement Public Lists	Optional	Oracle Purchasing User's Guide <a href="#">Section 3.2.1, "Extracting Catalog Data from Oracle Applications"</a>
Set Up iProcurement Attachments	Optional	<a href="#">Section 4.2.8, "Attachments"</a>
Define Contract Purchase Agreements	Optional	Oracle Purchasing User's Guide <a href="#">Section 3.2.1, "Extracting Catalog Data from Oracle Applications"</a>
Define Shipping Networks and Customer Locations for Internal Requisitions (Required for Internal Requisition Creation)	Optional	Oracle Order Management User's Guide, Oracle Purchasing User's Guide, & Oracle Inventory User's Guide <a href="#">Section 4.1.6, "Internal Requisitions"</a>
Set Up P-Cards	Optional	Oracle Purchasing User's Guide <a href="#">Section 4.1.8, "Employee P-Cards"</a> <a href="#">Section 4.1.9, "Supplier P-Cards"</a> <a href="#">Section 4.1.10, "Purchase Order (PO) Extract for P-Card Reconciliation"</a>
Set Up Realms	Optional	<a href="#">Section 3.5, "Defining Realms"</a>
Commodity Based Expense Account Rules	Optional	<a href="#">Section 4.1.4, "Expense Charge Account Rules"</a>
Return Material Authorizations	Optional	Oracle Purchasing User's Guide
E-Commerce Gateway Setup Mapping	Required for Punchout	<a href="#">Section 3.1.3, "Example Stores and Catalogs"</a> , <a href="#">Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange</a>

## 2.3 Setup Steps: Integration With Other Oracle Applications

The following table lists the setup steps specific to implementing features of other Oracle Applications with Oracle iProcurement 11i.

**Table 2–3** *integration Setup Steps*

<b>No</b>	<b>Step</b>	<b>If Oracle Purchasing Is Setup</b>	<b>If Oracle Purchasing is not setup</b>	<b>Information Source</b>
1	Set Up Encumbrance	Not Required	Required	Oracle Purchasing User's Guide, Oracle General Ledger User's Guide
2	Set Up Grants Accounting	Not Required	Required	Oracle Grants Accounting User's Guide
3	Projects Accounting	Not Required	Required	Oracle Project Resource Management User's Guide
4	Projects Manufacturing	Not Required	Required	Oracle Project Resource Management User's Guide

## 2.4 Profile Options

A number of profile options govern the behavior of Oracle iProcurement 11*i*. During implementation, you must set a value for each profile option to specify how Oracle iProcurement 11*i* controls access to and processes data.

The tables that follow display the profile options applicable to Oracle iProcurement 11*i* and are separated into two groups:

- Profile Options Set by System Administrator
- Profile Options Set by User

### 2.4.1 Profile Options Set by System Administrator

The following table lists the profile options specific to iProcurement that should be set by the system administrator.

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**Notes:**

- Some of the profile options listed below are shared by several applications, such as Oracle Purchasing and other Self Service Web Applications. For more information on these applications, refer to the Related Documents section in the Preface of this guide.
  - The profile options are listed in pseudo-alphabetical order. That is, ignoring the various placement of spaces in the title. Profiles in the application are displayed in pure alphabetical format which includes the space character and will be shown in a slightly different order. This was done to simplify finding the profiles for the first time.
- 
-

**Guide to Profile Option Table:**

The column labeled Level indicates at which level the profile can be set. The levels are:

- Site
- Application (App)
- Responsibility (Resp)
- User

The column labeled with R indicates whether the profile option is required (must be set with a value) for Oracle iProcurement to operate.

- Required is indicated by Y

**Table 2-4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
Application Framework Agent	Site App Resp User	Y	HTTP server that is used by the Oracle Self-Service Framework application. The system administrator who configured Oracle Self-Service Framework should already have set this profile option. If requesters experience errors on the <b>Search Results</b> page after first adding an item to the cart, you may need to remove the trailing slash from this profile option value. <i>Default Value:</i> No default
Apps Servlet Agent	Site App Resp User	Y	The URL, including the hostname and port number, from where the Oracle iProcurement server is running. <i>Default Value:</i> No default
Attachment File Directory	Site App Resp User	N	Specifies the directory where attachments are stored. <i>Default Value:</i> No default

**Table 2-4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
ECX: Log File Path	Site	N	Directory where the Oracle XML Gateway engine writes its log files. The directory must be one of the valid directories specified in the <i>UTL_FILE_DIR</i> parameter in the <i>init&lt;SID&gt;.ora</i> file in your Oracle Applications 11i instance. This must be an absolute path and cannot contain a symbolic link or other operating system specific parameters. <i>Default Value:</i> No default
FND: NATIVE CLIENT ENCODING	Site App Resp User	N	Encoding that you want to default into the spreadsheet that you download from the <b>Download Resources</b> page in the eContent Manager (accessible through the iProcurement Catalog Administration responsibility). For example, if you select the Cp1252 encoding for this profile option (also displayed as the technical name WE8MSWIN1252), the #ENCODING field in the spreadsheet template defaults to Cp1252. See <a href="#">Appendix A</a> for more information about encoding in spreadsheet bulk load files. <i>Default Value:</i> WE8MSWIN1252
Help Localization Code	Resp User	N	Indicates the localization code for localized help files. See the <i>Oracle Applications System Adminstators Guide</i> for complete details. <i>Default Value:</i> No default
HR:Cross Business Groups	Site	N	This profile impacts the suggested buyer functionality and the global supervisor feature. When set to <i>Yes</i> , buyers from different business groups can be assigned (or defaulted) to a given requisition line. Also, building approval lists with employees and finding buyers from multiple business groups is controlled through this profile. When set to <i>Yes</i> , both the buyer and approver list of values (LOV) can cross business group boundaries. <i>Default Value:</i> Yes
ICX: Client IANA Encoding	Site	Y	Character set encoding (such as UTF-8) used by the application server to generate HTML for the browser. This encoding determines the way data is sent to the browser and rendered. <i>Default Value:</i> Western European (ISO-8859-1)

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
ICX: Date Format Mask	Site User	N	<p>Determines the date format mask to use. The American English default is DD-MON-RRRR, for example, 12-NOV-2002. For year 2000 compliance, all year formats are converted to RRRR, which accepts four-digit century and year entries verbatim (1950 is stored as 1950) and converts two-digit year entries as follows:</p> <ul style="list-style-type: none"> <li>▪ Entries of 00 to 49 are converted to 2000 to 2049, respectively.</li> <li>▪ Entries of 50 to 99 are converted to 1950 to 1999, respectively.</li> <li>▪ For example, if a requester enters 50 for the year, the year is converted and stored as 1950. If a requester enters 49, the year is converted and stored as 2049.</li> </ul> <p><i>Default Value:</i> Depends on language</p>
ICX: Days Needed By	Site App Resp User	N	<p>Determines the number of days until the requester needs the order. This value is used to calculate the need by date.</p> <p><i>Default Value:</i> 2</p>
ICX: Language	Site User	N	<p>Determines the default session language.</p> <p><i>Default Value:</i> No default</p>
ICX: Limit connect	Site User	N	<p>Determines the maximum number of page hits per session.</p> <p><i>Default Value:</i> 1000</p>
ICX: Limit time	Site User	N	<p>Determines the maximum number of hours a requester can be logged on per session.</p> <p><i>Default Value:</i> 4</p>
ICX: Numeric characters	Site User	N	<p>Enter the preferred decimal and group separators you want to display for numbers. For example, if you enter ., as the value for this profile option, you indicate that the decimal separator is a period and the group separator is a comma. In this example, if you enter these two values at the site level, all requesters in Oracle iProcurement for the specified site will see the number three thousand as 3,000.00. If the value is entered as ,, for the profile option, three thousand would display as 3.000,00.</p> <p><i>Default Value:</i> No default (If this profile option is blank, the decimal and group separators are obtained from the nls_numeric_parameters setting in the database.)</p>

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
ICX: Override Location Flag	Site App Resp User	N	Determines whether the default location to deliver orders can be overridden.  <i>Default Value: Yes</i>
ICX: Override Requestor	Site App Resp User	N	Determines whether a requester can override the default requester.  <i>Default Value: No default</i>
ICX: Requisition Sever	Site Resp	N	The hostname and port for the Internet Application Server (iAS) where Oracle iProcurement is installed and running.  <i>Default Value: No default</i>
MRP: Default Sourcing Assignment Set	Site Resp User	N	Sourcing rules dictate which supplier or internal organization will supply a given requisitioned item. Sourcing rules are utilized by Oracle iProcurement so that a default source can be generated by the application. In Oracle iProcurement only those sourcing rules that have been assigned to the assignment set defined in this profile will be used when the sourcing logic is called.  <b>Note:</b> This profile option is shared with other Oracle Applications. Use caution when setting it.  <i>Default Value: No default</i>
PA: Allow Override of PA Distribution in AP/PO	Site App Resp User	N	If this profile value is set to <i>Yes</i> , only then a requester will be able to make project related changes to the charge account information in the <b>Edit Charge Account</b> page and <b>Allocate Costs to Multiple Accounts</b> page.  <i>Default Value: No default</i>
PO: Allow Requisition Approval Forward Action	Site	N	When this profile is set to <i>Yes</i> , <i>Approve</i> , <i>Reject</i> , <i>Forward</i> , <i>Approve</i> and <i>Forward</i> actions are allowed in a requisition approval notification. Otherwise, only <i>Approve</i> and <i>Reject</i> actions are allowed.  <i>Default Value: Yes</i>
PO: Legal Requisition Type	Site App Resp	N	Indicates whether requesters can enter internal requisitions sourced from stock by means of an internal sales order, purchase requisitions sourced from a supplier by means of a purchase order, or both types. Valid values are <i>Both</i> , <i>Internal</i> , and <i>Purchase</i> .  <i>Default Value: No default (If this profile option is blank, Oracle iProcurement assumes the value is Both.)</i>

Table 2-4 Profile Options Defined by System Administrator

Profile Option Name	Level	R	Profile Option Description
PO: Notification Lines Display Limit	Site App Resp User	N	Maximum number of requisition lines to be displayed in a requisition approval notification.  <i>Default Value: 20</i>
PO:Workflow Processing Mode	Site App Resp User	N	Affects the performance of the Purchasing approval workflow processes. Online completes an entire approval workflow process before letting you proceed to the next activity. Background allows you to proceed to the next activity while the approval process completes in the background. Whichever option you choose, you can always view the current status of a requisition or purchase order through the Requisitions Summary or Purchase Orders Summary windows.  When this profile option is set to <i>Background</i> , you must start the Workflow Background Process, which you access through the System Administration responsibility. It is recommended that you set this process to run frequently, if you are using it for Background mode approvals.  <i>Default Value: No default</i>
POR: Allow Manual Selection of Source	Site Resp User	N	If set to <i>Yes</i> and internally orderable items are displayed, then the Stocked Internally column will display the Select Source link for all internally orderable items. If set to <i>No</i> , then no distinction will be made between strictly purchasable items and items that are internally orderable.  <i>Default Value: No</i>
POR: Allow p-card use with encumbrance	Site App Resp User	N	This profile controls whether items on a requisition can be charged to P-Cards (both employee and supplier) when encumbrance is turned on. It can be set to <i>Yes</i> or <i>No</i> to control the behavior at the requester and responsibility level. When set to <i>Yes</i> , all eligible items can be charged to a P-Card even when encumbrance is turned on. For all purchase orders charged to a P-Card, the purchase order encumbrance should be manually relieved using Oracle General Ledger.  <i>Default Value: No default</i>
POR: Amount Based Services Line Type	Site	N	Determines the line type for amount-based non-catalog requests. An amount-based request is expressed in monetary terms, for example, 500 USD worth of service.  The value set here should be distinct from the values set for POR: Goods Line Type and POR: Rate Based Services Line Type.  <i>Default Value: No default</i>

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR: Apply Category Mapping	Site	N	<p>Set this profile option if you want to determine whether to apply category mappings defined in Oracle e-Commerce Gateway to bulk loaded files. During bulk loading, you can choose a Yes or No option whether you want to apply category mapping to the bulk load file. This profile option determines what the default selection for that option will be. If you set this profile option to <i>Yes</i>, by default the bulk loader will apply category mapping to the file, unless you choose otherwise on the <b>Bulk Load Items &amp; Price Lists</b> page. If you set this profile option to <i>No</i>, by default the bulk loader will not apply category mapping to the file, unless you choose otherwise. For more details, see <a href="#">Define Category Mapping</a> on page 3-34.</p> <p><i>Default Value:</i> No</p>
POR: Apply Expense Account Rules to Favorite Charge Accounts	Site App Resp User	N	<p>Set this profile option to <i>Yes</i> when you want the Expense Account Rules to apply to the requester's Favorite Charge Accounts.</p> <p><i>Default Value:</i> No</p>
POR: Approved Pricing Only	Site User	N	<p>Restricts requester access to only those items associated with blanket purchase agreements, catalog quotations, and requisition templates. For example, item AB22ZL exists in the catalog, but is not associated with a blanket purchase agreement, catalog quotation, or requisition template. (For example, it is bulk loaded.) When requesters search for item AB22ZL, it does not appear in their search results.</p> <p><i>Default Value:</i> No</p>
POR: Bulk Load for All Business Groups	Site Resp User	N	<p>When this profile option is set to <i>No</i>, the person bulk loading or mass deleting catalog items can specify only operating units in that person's business group. When this profile option is set to <i>Yes</i>, the person bulk loading or mass deleting catalog items can specify any operating unit, even in another business group.</p> <p>This profile option affects the <b>Bulk Load Items &amp; Prices</b> page when bulk loading a file that specifies operating units, the <b>Specify Options</b> page when selecting an operating unit for the bulk load file, and the <b>Mass Delete</b> page when selecting an operating unit for which to mass delete items.</p> <p><i>Default Value:</i> No</p>

**Table 2-4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR: Bulk Loader/Extractor Commit Size	Site	N	<p>Determines the batch size used to commit records to catalog tables when bulk loading, extracting, or purging data. You can change the default setting depending on the volume of purchasing data you expect to extract or bulk load and your database configuration. For example, if the commit size is exceptionally large, errors may occur. If the value is too small, there may be performance issues. Contact your database administrator to see whether you should change the default commit size.</p> <p><i>Default Value: 2500</i></p>
POR : CA Certificate File Name	Site	N	<p>This profile option is used by punchout and transparent punchout catalogs when those catalogs reside on a secure site. (See <a href="#">Types of Catalogs</a> on page 3-3.) It specifies the file name that includes the certificates your company's server is willing to accept. This file should be readable and should be accessible from the middle tier. If you have multiple JVMs, then this directory should be accessible from all the JVMs. By default you can use the file \$APACHE_TOP/Oracle/conf/ssl.crt/ca-bundle.crt, where \$APACHE_TOP is the root directory where iAS is installed. The ca-bundle.crt file includes certificates from various signing authorities. For more information, see the <i>Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange</i>.</p> <p><i>Default Value: No default</i></p>
POR: Catalog Bulk Load Directory	Site	Y	<p>Specifies the directory path used to store catalog files that are submitted for loading into Oracle iProcurement. When the catalog administrator submits a catalog to load into Oracle iProcurement, the catalog file is uploaded to the path specified in this profile option. The bulk loader then processes the file from this location. Ensure that both the bulk loader and middle tier have read-write access to this directory. You should enter a read-write access directory that is valid in your system.</p> <p><i>Default Value: No default (If this profile option is blank, /tmp/ is assumed.)</i></p>
POR: Catalog Bulk Loader Host	-	-	OBSOLETE

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR: Change Catalog Language	Site App Resp User	N	<p>If catalog items exist in multiple languages, requesters can search for items in a language other than their default session language. For example, if an item exists only in the German version of the catalog, requesters will not find it unless they change their search language to German, using the Change Catalog Language link on the Shop home and search results pages.</p> <p>Set this profile option to <i>Yes</i> to enable requesters to change their search language. Set this profile option to <i>No</i> to hide the Change Catalog Language link, to restrict requesters to purchasing items only in the default session language. You should set this profile option to <i>No</i> if you do not want requesters to purchase items that are available in languages other than their session language.</p> <p><i>Default Value:</i> No</p>
POR : Cleanup Thread Interval	Site	N	<p>Specifies a number to indicate how often, in milliseconds, unused requisition objects are removed from the object cache in the middle tier. Entering a value of 0 or null means no cleanup.</p> <p><i>Default Value:</i> No default</p>
POR: Debugging	-	-	OBSOLETE
POR : Default Currency Conversion Rate Type	Site App Resp User	N	<p>Use this profile option to specify the default exchange rate type. This rate is used when creating non-catalog requests, when converting a bulk loaded item's transactional price into a requester's functional price, and when converting a punchout or transparent punchout item's transactional price into the functional price.</p> <p>If you will be converting prices of punchout or transparent punchout items, this profile option must be set to either Corporate or Spot (not User). Otherwise, the requester will receive an error message during checkout that no exchange rate exists and will not be able to check out the item.</p> <p><i>Default Value:</i> No default</p>
POR: Distribution Lines Region	Site Resp	N	<p>Provides support for the requisition distribution lines. Set this profile with the name of the distribution lines region.</p> <p><i>Default Value:</i> No default (If this profile option is blank, the region shipped with the product is used.)</p>
POR: Dtd Files Directory	Site	N	<p>Dtd files absolute directory. For example. oracle_stuff/XML/orc115.</p> <p><i>Default Value:</i> No default</p>
POR: Ecmanager Servlet Path	-	-	For internal use by Oracle only.

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR : Edit Accounts Region	Site Resp	N	Provides support for multiple chart of accounts. Using the Web Application Dictionary, create a region with the relevant chart of accounts structure, and associate this region at the responsibility level. This region will be used to display the <b>Edit Accounts</b> page.  <i>Default Value:</i> No default (If this profile option is blank, the region shipped with the product is used.)
POR: Enable Automatic Debit Memo Creation for Returns	Site Resp User	N	Enables automatic creation of debit memos for all return to supplier transactions. Valid values are Yes or No.  <i>Default Value:</i> No
POR : Emergency Requisitions - Restrict to Requisition Templates	-	-	OBSOLETE
POR: Enable Advanced Search and Category Browse	Site Resp User	N	Set this profile option if you are not using the local catalog, but are implementing only punchout or transparent punchout catalogs. (See <a href="#">Types of Catalogs</a> on page 3-3.) Punchout and transparent punchout catalogs do not use the advanced searching or category browsing features; only the local catalog uses these. Therefore, if you are implementing only punchout or transparent punchout catalogs, you can set this profile option to <i>No</i> to hide all Advanced Search links and to disable the browse categories feature. Set this profile option to <i>Yes</i> to enable advanced searching and category browsing. If this profile option is set to <i>No</i> , requesters can still use standard searching, which includes searching of punchout and transparent punchout catalogs; only the advanced searching and category browsing features are disabled.  <i>Default Value:</i> No default (If this profile option is blank, Oracle iProcurement assumes the value is Yes.)
POR: Enable Automatic Debit Memo Creation for Returns	Site App Resp User	N	This profile is used to turn on/off Automatic Debit Memo Creation for Returns support in Oracle iProcurement. Valid values are Yes or No.  <i>Default Value:</i> No
POR: Enable Check Funds	Site Resp User	N	This profile can be used to control if the check funds is initiated as part of the requisition submission process. Valid values are; Display error on failure, Display warning on failure, and No checkfunds.  <i>Default Value:</i> No checkfunds

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR: Enable Req Distribution Customization	Site Resp User	N	This profile is used to control if the distribution related customization procedures need to be invoked as part of the requisition creation. Valid values are Yes or No. <i>Default Value: No default</i>
POR : Enable Requisition Line Customization	Site App Resp	N	Determines whether line level customization is enabled. Valid values are Yes and No. <b>Note:</b> You must customize these APIs prior to setting this profile option to Yes. <i>Default Value: Yes</i>
POR: Extract BPA/Quote Images	Site App Resp User	N	If items on blanket purchase agreements or catalog quotations are associated with image files or image URLs, you can choose whether to extract the images along with the items into the Oracle iProcurement catalog. Requesters can then see the item's image to help them make their purchase. Set this profile option to <i>Yes</i> if you want to extract the images along with the items. See <a href="#">Extracting Items with Images</a> on page 3-54. <i>Default Value: Yes</i>
POR : Goods Line Type	Site	N	Indicates the line type that should be used for all bulk loaded items and quantity based non-catalog requests. The value set here should be distinct from the values set for POR: Amount Based Services Line Type and POR: Rate Based Services Line Type. <i>Default Value: No default</i>
POR: Help Path	Site Resp	N	For multi-org environments, this is the directory where operating unit-specific purchasing news is stored. Normally, this value is <i>/OU&gt;/</i> where OU refers to the name of the operating unit, for example, <i>/Vision Operations/</i> . <i>Default Value: No default</i>
POR: Hosted Images Directory	Site App Resp User	N	Specifies the directory where image files are stored. If you want to associate an item with a picture, the image file must be copied to this directory to appear in iProcurement. This path usually corresponds to the <i>/OA_MEDIA/</i> directory. <i>Default Value: No default</i>
POR: ITEMS DISPLAY NUM	-	-	OBSOLETE
POR: Java Virtual Path	-	-	OBSOLETE

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR:Load Auto Attrib	Site	N	Controls whether the bulk loader should automatically create any new local descriptors (also known as category attributes) encountered in a catalog bulk load file. Local descriptors are used to describe items in a specific category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Valid values are Yes and No. <i>Default Value:</i> No
POR: Load Auto Category	Site	N	Controls whether the bulk loader should automatically create any new categories encountered in a bulk load file. Valid values are Yes and No. <i>Default Value:</i> No
POR:Load Auto Root	Site	N	Controls whether the bulk loader should automatically create any new base descriptors (also known as root descriptors) defined in an XML, cXML, or Catalog Interchange Format (CIF) bulk load file. Base descriptors are attributes, such as Supplier, that apply to all items and services in the catalog. Valid values are Yes and No. <i>Default Value:</i> No
POR: Multiple Accounts region	Site Resp	N	Provides support for multiple charts of accounts. Using the Web Application Dictionary, create a region with the relevant chart of accounts structure, and associate this region at the responsibility level. This region will be used to display the <b>Multiple Accounts Page</b> . <i>Default Value:</i> No default value (If this profile option is blank, Oracle iProcurement uses the region shipped with the product.)
POR: One Time Location	Site Resp User	N	Enter the location to be used as the one-time address. The application uses the location code entered here as the one time location. The actual one-time address details are entered during checkout. <i>Default Value:</i> No default
POR: Override Supplier P-Card	Site Resp User	N	Controls whether the supplier P-Card takes precedence over employee P-Card when both P-Card types are eligible to be assigned to a requisition line. Valid values are Yes or No. <i>Default Value:</i> No
POR: Parallel Routing Allowed	Site User	N	Determines whether parallel routing is supported. Valid values are Yes or No. <i>Default Value:</i> No

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR : Proxy Server Name	Site	N	<p>Used for punchout and transparent punchout catalogs. It specifies the proxy server (Web Server) name if your Oracle iProcurement implementation has a proxy setup. The proxy server is typically the same as the proxy server that is set up in people's browsers in your company—for example, www-proxy.company.com. For more information, see the <i>Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange</i>.</p> <p>Any time you change this profile option, you must restart iAS for the change to take effect.</p> <p><i>Default Value:</i> No default</p>
POR : Proxy Server Port	Site	N	<p>Used for punchout and transparent punchout catalogs. It specifies the port on which the proxy server listens if your Oracle iProcurement implementation has a proxy setup. The port is typically the same as the port that is set up in people's browsers in your company—for example, 80. For more information, see the <i>Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange</i>.</p> <p>Any time you change this profile option, you must restart iAS for the change to take effect.</p> <p><i>Default Value:</i> No default</p>
POR: Purge Jobs Older Than (days)	Site	N	<p>Catalog administrators can use this profile option to specify the number of days catalog bulk loader job history is stored in the database. This setting helps minimize the amount of disk space used by the bulk loader tables. When the bulk loader is started, it retrieves this profile option setting and purges any data older than the value in the profile option.</p> <p>The tables from which the data is purged include: ICX_POR_BATCH_JOBS, ICX_POR_FAILED_LINE_MESSAGES, ICX_POR_FAILED_LINES, and ICX_POR_CONTRACT_REFERENCES. You can also use the POR: Bulk Loader/Extractor Commit Size profile option to determine how many records are purged at a time.</p> <p><i>Default Value:</i> 30</p>
POR : Rate Based Services Line Type	Site	N	<p>Specifies the line type for rate-based non-catalog requests. A rate-based request is expressed as a monetary charge per time period.</p> <p>The value set here should be distinct from the values set for POR: Goods Line Type and POR: Amount Based Services Line Type.</p> <p><i>Default Value:</i> No default</p>

Table 2-4 Profile Options Defined by System Administrator

Profile Option Name	Level	R	Profile Option Description
POR: Require Blind Receiving	Site App Resp User	N	This profile is used to turn on/off Blind Receiving support in Oracle iProcurement. Blind receiving support requires corresponding setup in Oracle Purchasing. Valid values are Yes or No.  <i>Default Value:</i> No
POR: ROWS DISPLAY NUM	-	-	OBSOLETE
POR: Search Governor Value	Site	N	This profile option controls the number of search results requesters can sort and filter. If the number of search results is greater than the value specified in this profile option, requesters cannot sort or filter the results. A message displays to the requester prompting the requester to use additional search criteria to narrow their results before sorting or filtering.  This profile option affects only sorting and filtering. It does not determine the number of search results in general. It also does not affect relevance sorting in the local catalog.  <b>Note:</b> The higher the search governor value, the slower the search performance in general. Use careful judgment before increasing the value.  <b>Note:</b> This profile option does not apply to transparent punchout search results, only to local search results.  <i>Default Value:</i> 2500
POR: Select Internal Requisition for Confirm Receipts	Site	N	If set to <i>Yes</i> , internal requisitions will be included in the confirm receipt notifications sent to the requester. If set to <i>No</i> , internal requisitions will not be included with the confirm receipt notifications sent to the requester.  <i>Default Value:</i> Yes
POR: Select Inventory Replenishment Lines for Confirm Receipts	Site	N	For Confirm Receipts set this profile option to <i>Yes</i> if you want the Confirm Receipts Workflow process to select PO shipments with destination type Inventory in addition to PO shipments with destination type Expense.  <i>Default Value:</i> Yes
POR: Servlet Virtual Path	Site	N	The virtual path to the Oracle Applications servlet zone. For 11i, this should be set to <i>oa_servlets</i> .  <i>Default Value:</i> oa_servlets

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR: Set Debug Catalog Loader ON	Site	N	<p>Set this profile option to <i>Yes</i> or <i>Yes with Detail</i> when you want to record debug messages in the log file while bulk loading a catalog file—for example, if you are experiencing problems with the bulk loader or trying the bulk loader for the first time. These messages can be viewed in the Log screen in the Requests window. (See <a href="#">Viewing the Log File</a> on page 3-24.) As soon as you are finished debugging the problem, set this profile option back to <i>No</i>, to minimize performance issues. The options are as follows:</p> <ul style="list-style-type: none"> <li>■ <b>No:</b> The bulk loader records informational messages, including parameters selected on the <b>Specify Options</b> page before loading, and information that the job has started, it is beginning the index rebuild, and so on.</li> <li>■ <b>Yes:</b> In addition to informational messages, the bulk loader records debug messages that can help identify problems.</li> <li>■ <b>Yes with Detail:</b> In addition to informational and debug messages, the bulk loader records line-level debug messages. If you need to generate SQL trace information to track loader performance issues, choose <i>Yes with Detail</i>.</li> </ul> <p><i>Default Value:</i> No</p>
POR: Show Thumbnail Images	Site App Resp User	N	<p>Set this profile option to control whether thumbnail images loaded to the local catalog display on the <b>Search Results Summary</b> and <b>Search Results</b> pages. For example, if you want to wait until all thumbnail images are loaded before displaying them or if you encounter issues, you can set this profile option to <i>No</i> to hide all thumbnail images. Set this profile option to <i>Yes</i> to display all thumbnail images.</p> <p>This profile option sets the default, but requesters can also choose whether to display thumbnail images using My Profile. For example, if this profile option is set to <i>No</i>, a requester can choose <i>Yes</i> to display them for himself.</p> <p><b>Note:</b> The purpose of this profile option is to temporarily show or hide thumbnail images. This profile option does not control whether thumbnail images display on the <b>Compare Item</b> page. To hide thumbnails from the <b>Compare Item</b> page or to completely hide thumbnails from all pages, use schema editing available in the eContent Manager.</p> <p>See <a href="#">Managing Images</a> on page 3-50 for complete information on controlling thumbnail images.</p> <p><i>Default Value:</i> Yes</p>

Table 2–4 Profile Options Defined by System Administrator

Profile Option Name	Level	R	Profile Option Description
POR: Sort by Relevance	Site	N	<p>Set this profile option to <i>Yes</i> if you want to always display search results sorted by relevance. Relevance is a calculation that ranks search results based on how closely the results match the search criteria, and displays the most closely matching items first. If you set this profile option to <i>No</i>, the search results are not automatically ranked by relevance; however, the requester can still select a Sort by Relevance option to perform relevance ranking on specific search results if desired.</p> <p><b>Note:</b> When search results are large, setting this profile option to <i>Yes</i> may slow down the search performance. Use careful judgment before enabling sort by relevance as the automatic behavior.</p> <p>Relevance sorting is used by standard, expanded, and advanced search results. It is not used by transparent punchout search results.</p> <p><i>Default Value:</i> No</p>
POR: SSP VERSION	Site	Y	<p>Indicates the version of Oracle iProcurement that is installed. This profile option should always be set to 5.</p> <p><i>Default Value:</i> 5</p>
POR: SSP4 Installed	Site	Y	<p>This profile option should always be set to <i>Yes</i>.</p> <p><i>Default Value:</i> Yes</p>
POR: Support review for Express Receive	Site Resp User	N	<p>When this profile is set to <i>Yes</i>, the <b>Review and Submit</b> page will be shown during express receiving. Otherwise, the requester will be directed to the <b>Confirmation</b> page directly.</p> <p><i>Default Value:</i> Yes</p>
POR : System Approvers are Mandatory	Site User	N	<p>Determines whether or not the default approvers on the approver list are mandatory.</p> <p><i>Default Value:</i> Yes</p>
POR: Thumbnail Height	Site App Resp User	N	<p>Set this profile option if you are bulk loading items to the local catalog and you want to specify thumbnail images for the items. Thumbnail images appear on the <b>Search Results Summary</b>, <b>Search Results</b>, and <b>Compare Items</b> pages. Use this profile option to specify the height, in number of pixels, for all thumbnail images. Use this profile option when the size of the source file needs to be adjusted for thumbnail images. (It is recommended that you set <i>either</i> this or the POR: Thumbnail Width profile option rather than both profile options, to avoid fixed sizing. See <a href="#">Managing Images</a> on page 3-50.)</p> <p><i>Default Value:</i> No default</p>

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR: Thumbnail Width	Site App Resp User	N	Set this profile option if you are bulk loading items to the local catalog and you want to specify thumbnail images for the items. Thumbnail images appear on the <b>Search Results Summary</b> , <b>Search Results</b> , and <b>Compare Items</b> pages. Use this profile option to specify the width, in number of pixels, for all thumbnail images. Use this profile option when the size of the source file needs to be adjusted for thumbnail images. (It is recommended that you set <i>either</i> this or the POR: Thumbnail Height profile option rather than both profile options, to avoid fixed sizing. See <a href="#">Managing Images</a> on page 3-50.)  <i>Default Value:</i> No default
POR: Transparent Punchout Timeout Limit	Site App Resp User	N	Set this profile option if you are setting up a transparent punchout catalog. (See <a href="#">Types of Catalogs</a> on page 3-3.) Enter the time, in seconds, after which you want transparent punchout catalogs to time out if the search takes longer than this time to complete. For example, if you enter 30 and a transparent punchout catalog takes longer than 30 seconds to return results, Oracle iProcurement displays a message after 30 seconds that the Web site is not responding. The timeout does not affect other catalog search results if other catalogs are in the store. It affects only the transparent punchout catalog or catalogs in the store that take longer than this timeout to return results. If the profile option is left blank, Oracle iProcurement assumes a timeout of 60 seconds.  <i>Default Value:</i> 60
POR: Use Oracle Approvals Manager	Site	N	Indicate whether Oracle Approvals Manager (OAM) will be used as the approval engine for requisitions.  <i>Default Value:</i> No default

**Table 2–4 Profile Options Defined by System Administrator**

Profile Option Name	Level	R	Profile Option Description
POR : Use Sequence for Requisition Numbering	Site	N	Use this profile option to indicate whether requisitions created in Oracle iProcurement should follow the same numbering schema as Oracle Purchasing, or if requisition numbers should be generated using the database sequence, which may provide an increase in performance.  Note that if this profile option is set to <i>Yes</i> , requisition numbers will be shared across operating units.  <i>Default Value:</i> No
TAX: Allow Override of Tax Code	Site App Resp User	N	This profile controls the ability to modify the tax code that can be defaulted during the requisitioning process. When set to No, the tax code field cannot be overridden, nor can the LOV be accessed.  <i>Default Value:</i> No default
TAX: Allow Override of Tax Recovery Rate	Site App Resp User	N	This profile controls the ability to modify the tax recovery rate that can be defaulted during the requisitioning process.  <i>Default Value:</i> No default

## 2.4.2 Profile Options Set by Users

The following table lists profile options specific to the requester. These values are set when requesters define their preferences in Oracle iProcurement 11i using the My Profile page.

**Table 2–5 Profile Options Set From My Profile**

<b>Profile Option</b>	<b>Description</b>
POR: Catalog Result Set Size	Determines how many items display on the <b>Search Results</b> page before requesters need to click Next. The maximum number is 25. <i>Default Value: 7</i>
POR: My Favorite Store	Specifies the store that always displays at the top of the <b>Shop</b> page for that user. (See <a href="#">Figure 3–1</a> .) If no favorite store is specified, or if you specify -1 for this profile option, Oracle iProcurement displays the system-assigned store as the favorite store. The system-assigned store is the store that the user has access to (see <a href="#">Defining Realms</a> on page 3-64) that has the lowest sequence number. (When the catalog administrator create stores, he can also sequence them.) <i>Default Value: -1</i>
POR : Preference - Display Transaction Currency	When set to Yes, each requester will have the ability to enable or disable the foreign currency display within Oracle iProcurement. <i>Default Value: No default</i>
POR: Preferences - Award	Enable requesters to set their preferred award ID. <i>Default Value: No default</i>
POR : Preferences - Deliver to Location	Enables requesters to set their preferred deliver to location. <i>Default Value: No default</i>
POR : Preferences - Expenditure Item Date	Enables requesters to set their expenditure item date for project-related requisitions. <i>Default Value: No default</i>
POR : Preferences - Expenditure Org	Enables requesters to set their expenditure organization for project-related requisitions. <i>Default Value: No default</i>
POR : Preferences - Expenditure Type	Enables requesters to set their expenditure type for project-related requisitions. <i>Default Value:</i>
POR : Preferences - Project	Enables requesters to set their project number for project related requisitions. <i>Default Value: No default</i>
POR : Preferences - Requester	Enables requesters to set a default requester. <i>Default Value: No default</i>
POR : Preferences - Selected Items Default to Inventory	Enables requesters to indicate whether ordered items are to replenish inventory. <i>Default Value: No default</i>

**Table 2–5 Profile Options Set From My Profile**

<b>Profile Option</b>	<b>Description</b>
POR : Preferences - SubInventory	If items are to replenish inventory, requesters can select a default subinventory for those items. This is only valid if the POR: Preferences - Inventory Replenishment profile is set to Yes. <i>Default Value:</i> No default
POR : Preferences - Task	Requesters can set their task number for project related requisitions. <i>Default Value:</i> No default
POR: Result Set Size	Requesters can indicate how many records per page they wish to see when viewing search results on the <b>Receiving</b> and <b>Requisition Status</b> pages. <i>Default Value:</i> 10

## 2.5 Administration

This section discusses the implementation of features associated with administering or managing the iProcurement functionality. Important utilities have been included in iProcurement which can enhance the requester's experience with the iProcurement product. The features included in this section to enhance the general usability of the application are:

- Retrieve Forgotten Passwords
- Multi-Operating Unit Purchasing News
- Direct Sign-On
- Multi-Byte Language Support
- Online Help
- Customizable Operating Unit Specific Purchasing Policies

### 2.5.1 Reset Forgotten Passwords

This feature enables the system administrator to be notified when users have lost or forgotten their password and need assistance. When a requester has forgotten their password, the requester may click on a link that will send an e-mail notification to the system administrator. The administrator can then respond and reset the user's password. The e-mail address of the system administrator can be specified using the system property SYSADMIN in the ssp\_init.txt file.

#### Setup Steps:

1. Open ssp\_init.txt.
2. [iAS ORACLE\_HOME]/Apache/Jserv/etc/ssp\_init.txt
3. Add the following line to the file:
4. SYSADMIN=<email address>
5. Save the file.
6. Restart iAS.

#### Profile Options

None

### AK Regions/Attributes

None

### Function Security

Access to this function can be restricted by excluding the menu function Reset Password. See [Security](#) on page 2-34 for detailed instructions.

### Workflow

None

### Implementation Considerations

No additional

## 2.5.2 Multi-Operating Unit Purchasing News

You can create operating unit specific purchasing news. Requesters will be able to view information that is pertinent only to their operating unit when accessing this area from the iProcurement home page

### Setup Steps:

1. Create a directory under OA\_HTML/<language code>/.
2. For example: OA\_HTML/US/operating\_unit\_1 where operating\_unit\_1 is your help path.
3. Copy PORPNEWS.htm to the directory that was created in step 1. Modify this file to include content specific to the operating unit.
4. Set the value for the responsibility level profile option POR: Help Path to the location of the operating unit specific files as specified in Step 1. See [Profile Options Set by System Administrator](#) on page 2-8 for details.
5. For the example from Step 1 you would enter /operating\_unit\_1/ for the profile option.

---

---

**Note:** The POR: Help Path profile option includes a / at the beginning and at the end of the string. OA\_HTML is the path of all the iProcurement HTML files and is part of iAS setup.

---

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### **Profile Options**

None

### **AK Regions/Attributes**

None

### **Function Security**

None

### **Workflow**

None

### **Implementation Considerations**

No additional

## **2.5.3 Direct Sign-On**

Requesters can gain access to the **iProcurement** home page in a more direct manner. There is an alternate method for signing on to the **iProcurement** home page directly. If you have only one iProcurement responsibility, using Direct Sign-On will bring you directly to the **iProcurement** home page after you have entered your username and password. If however, you have multiple responsibilities, the Purchasing Roles page will display. In this case, you must select a purchasing role and click OK to sign on. To switch responsibilities, you must sign off, then sign on again.

### **To access the direct sign-on page:**

Type in the following URL:

```
http://<iAS host.domain>:<iAS listener port> \  
/OA_HTML/jsp/por/services/login.jsp
```

By default this is in US language.

To specify another language:

```
http://<iAShost.domain>:<iAS listener port> \  
/OA_HTML/jsp/por/services/services/login.jsp? \  
displayLanguage=<language code>
```

where <language code> is any of the installed Oracle Applications language codes.

---

---

**Attention:** The use of white space and continuation characters (\) in the above example is for ease of legibility. The URL is typically specified on a single line without white space.

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### **Profile Options**

None

### **AK Regions/Attributes**

None

### **Function Security**

None

### **Workflow**

None

### **Implementation Considerations**

No additional

## **2.5.4 Multi-Byte Language**

You can enable your system to handle Multi-Byte Language. These are languages where the character representation requires more than one byte.

### **Setup Steps:**

1. Set the `translate_params` to true in `[iAS ORACLE_HOME]/Apache/Jserv/etc/zone.properties`:  

```
servlet.oracle.jsp.JspServlet.initArgs=translate_params=true
```
2. In `[iAS ORACLE_HOME]/Apache/Jserv/etc/ssp_init.txt`, set the system property, `CHARSET` to the character set used to view that particular language. This must be identical to the character set used in the browser.

For example: `CHARSET=EUC-JP`

### **Profile Options**

None

### **AK Regions/Attributes**

None

### **Function Security**

None

### **Workflow**

None

### **Implementation Considerations**

No additional

## **2.5.5 Customizing Operating Unit Specific Purchasing Policies**

Customers can provide purchasing policies that cover the same topic, but in terms appropriate to specific countries, regions, or operating units. This can be accomplished by adding an optional localization code at the end of the anchor\_name in the help HTML files.

### **Setup Steps:**

1. Create the localization code to use. For example, **ou1** for operating unit 1.
2. Copy the original PORPOLCY.htm file to a new file with the same name. This file is under \$ICX\_TOP/help/<language code>.
3. Open the new file with an HTML editor.
4. Find the HTML anchor with the anchor\_name ppolicy (i.e. < A NAME = "ppolicy"></A>) for this help document. Append the localization code for the appropriate responsibility (see step 1) to this anchor name (i.e. < A NAME="ppolicy@ou1"></A>).
5. Change the PORPOLCY.htm file to include the localized information to be displayed for the given operating unit.
6. Save your changes.

7. Upload the localized help to the database using the Oracle Applications Help System Utility. Please refer to the *Oracle Applications System Administrator's Guide* for detailed instructions on using the Help System Utility.
8. Set the profile option Help Localization Code for the appropriate responsibility to the value defined with the anchor name in the HTML code.
  - a. Login to Oracle Applications and choose the System Administrator responsibility.
  - b. Navigate to the System Profiles form and search for the profile Help Localization Code and the appropriate responsibility (i.e. Internet Procurement).
  - c. Set the profile value to the localization code appended to the anchor name (like vs above) for the appropriate responsibility.

**Profile Options**

None

**AK Regions/Attributes**

None

**Function Security**

None

**Workflow**

None

**Implementation Considerations**

No additional

## 2.6 Security

Access to various aspects of Oracle iProcurement can be controlled through function and menu security as well as data security. The following sections discuss the setup of these security features.

### 2.6.1 Setting Up Function Security and Menu Security

Function security can be used to restrict requester access to certain functions and actions in various pages throughout Oracle iProcurement. For example, the Express Receive buttons might be excluded in Receiving, to prevent this type of receipt creation. Function security could also be used to prevent access to the Corrections pages in Receiving.

An administrator also has the option of setting menu security. Menu security attribute settings tend to be more broad in the areas they restrict than function security attribute settings. With menu security, a requester is prevented access to entire menus/submenus within Oracle iProcurement. With this type of setting the requester might be excluded from all of Receiving or all of Oracle iProcurement Workflow as opposed to just a specific button or link within these modules. Due to their more specific nature, there are more function security attributes than menu security attributes. Both function and menu security attributes are defined at the Responsibility level.

If changes are made to any Function or Menu Security, then the iAS (Apache) server must be bounced in order for the changes to be reflected in Oracle iProcurement.

#### Setup Steps

1. Log into Oracle Applications and select the System Administrator responsibility.
2. Choose Security > Responsibility > Define.
3. Create a new responsibility related to iProcurement. This responsibility will be used to enforce function security.
4. Be sure to enter a Responsibility Name, Application, Responsibility Key, and Effective From Date.
5. Available From should be set to Oracle Self Service Web Application.
6. Data Group fields for Name and Application should be entered as well.
7. The Menu field should be set to Internet Procurement Home.

**Exclude Responsibility Functions/Menus using the following steps:**

1. In the Menu Exclusions folder select either the Function or Menu selection to set up either function or menu security.
2. Tab to the Name field and select the appropriate function or menu to exclude.
3. Save the responsibility.

**Assign the iProcurement Responsibility to a requester**

1. Choose System Administrator > Security > requesters > Define.
2. Search for the requester to assign to the Responsibility.
3. Insert the new responsibility.
4. Save the requester record.

See the *Oracle Applications System Administrator's Guide* for more information.

**2.6.2 Oracle iProcurement Functions**

The following tables list functions that can be used to establish function security in Oracle iProcurement 11i.

**Table 2–6 Functions — Requisition Status Page: My Groups Requisitions**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
View My Group's Reqs	POR_VIEW_GROUP_REQS_RECEIVE	Receive register requested item(s) as received
View My Group's Reqs Cancel	POR_VIEW_GROUP_REQS_CANCEL	Cancel a requisition that has been submitted for approval
View My Group's Reqs Copy	POR_VIEW_GROUP_REQS_COPY	Create a requisition by copying an existing requisition
View My Group's Reqs ReSubmit	POR_VIEW_GROUP_REQS_RESUBMIT	Resubmit requisitions that have been rejected or returned
View My Group's Requisitions	POR_VIEW_GROUP_REQS	View requisitions created by employees in the requester's organization. This definition of group is based on the Security Level option selected during the Document Type setup.

**Table 2-7 Functions — Requisition Status Page: My Requisitions**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
View My Reqs Cancel	POR_VIEW_MY_REQS_CANCEL	Function security for the Cancel button
View My Reqs Copy	POR_VIEW_MY_REQS_COPY	Function security for the Copy button
View My Reqs Receive	POR_VIEW_MY_REQS_RECEIVE	Function security for the Receive button
View My Reqs Resubmit	POR_VIEW_MY_REQS_RESUBMIT	Function security for the Resubmit button
View my Requisitions	POR_VIEW_MY_REQS	Viewing Requisitions owned by a requester
View my Reqs Change Order	POR_VIEW_MY_REQS_CHANGE_ORDER	Function security to request changes and cancellations to requisition line(s) on purchase order(s).
View My Reqs Withdraw	POR_VIEW_MY_REQS_WITHDRAW	Function security for Withdraw button

**Table 2-8 Functions — Requisition Status Page: All Requisitions**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
View All Reqs Cancel	POR_VIEW_ALL_REQS_CANCEL	Cancel a requisition that has been submitted for approval
View All Reqs Copy	POR_VIEW_ALL_REQS_COPY	Create a requisition by copying an existing requisition
View All Reqs Receive	POR_VIEW_ALL_REQS_RECEIVE	Register requested item(s) as received
View All Reqs ReSubmit	POR_VIEW_ALL_REQS_RESUBMIT	Resubmit requisitions that have been rejected or returned
View All Requisitions	POR_VIEW_ALL_REQS	View all requisitions under requester's organization
View Reqs Change Order History	POR_VIEW_REQS_CHANGE_HISTORY	Function security for View Change History button.

**Table 2–9 Functions — Approvals Status Page: Requisitions I Approved**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
View Reqs I approved Cancel	POR_VIEW_APPR_REQS_CANCEL	Cancel a requisition that has been submitted for approval
View Reqs I approved Copy	POR_VIEW_APPR_REQS_COPY	Create a new requisition by copying an existing one
View Reqs I approved Receive	POR_VIEW_APPR_REQS_RECEIVE	Register requested item(s) as received
View Requisitions I approved	POR_VIEW_APPR_REQS	View Requisitions approved by a requester

**Table 2–10 Functions — Approvals Status Page: Orders to Approve**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
View orders to approve	POR_VIEW_TO_APPR_REQS	Ability to view orders to be approved
View orders to approve cancel	POR_VIEW_TO_APPR_CANCEL	Ability to cancel requisitions I have to approve
View orders to approve copy	POR_VIEW_TO_APPR_COPY	Ability to copy orders I have to approve

**Table 2–11 Functions — Approvers/Add Approvers Page**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
Add approver	POR_ADD_APPROVER	Change the requisition approval route based on the requester's choice of first approver
Change first approver	POR_CHANGE_FIRST_APPROVER	Change first approver
Delete approver	POR_DELETE_APPROVER	Delete non-mandatory approvers from a requisition's document approval routing list
Requester Default approver list	POR_requester_DEFAULT_APPROVERS	Ignore changes and revert to the original document approval routing list

**Table 2–12 Functions - Receive Orders Page**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
All Items to Receive	POR_ALL_ITEMS_TO_RECEIVE	Restrict a requester from receiving all items
Correct All Receipts	POR_SHOW_ALL_RCV_CORRECTIONS	Function to grant/deny access to correct all receipts
Correct Receipts	POR_SHOW_RCV_CORRECTIONS	Function to grant/deny access to correct receipts
Express Receive	POR_EXPRESS_RECEIVE	Create an Express Receipt
POR: Receive Orders	POR_RECEIVE_ORDERS	Allow a requester to receive orders
Return All Items	POR_SHOW_ALL_RCV_RETURNS	Function to grant/deny access to return all items
Return Items	POR_SHOW_RCV_RETURNS	Function to grant/deny access to return items
View All Receipts	POR_SHOW_ALL_RECEIPTS	Function to grant/deny access to view all receipts
View Receipts	POR_SHOW_VIEW_RECEIPTS	Function to grant/deny access to view receipts

**Table 2–13 Functions - Approver/Add Approvers Page**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
Approve or Reject a Requisition	POR_APPROVE_SHOW_REJECT_BTN	Approve or Reject a Requisition
Sort Approvers	POR_SORT_APPROVERS	Sort Approvers and display list based on sequence numbers
View Approvers	POR_VIEW_APPROVERS	View a requisition's likely document approval route before submission/approval

**Table 2–14 Functions - Other Functions**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
Change Multiple Lines	POR_CHANGE_MULTI_LINES	Update Multiple Requisition Lines while creating a requisition
Compare Search Results	POR_COMP_SEARCH_RESULTS	No longer used. All requesters can compare search results.
Express Setup Tools	POR_SSP_EXP_SETUP	Tools used to enable express setup of employees and locations
Favorite Charge Accounts	POR_FAV_CHG_ACCT	List of Favorite Charge Accounts
POR SSP ECManger	POR_SSP_ECMANAGER	Internet Procurement eContent Manager
POR SSP Home	POR_SSP_HOME	Internet Procurement Home Page
Reset Password	POR_RESET_PWD_FUNC	Reset password in Profile Page
SSP Notification Reassignment	POR_NOTIFY_REASSIGN	

**Table 2–15 Functions - Requisition Checkout**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
Display Check Funds Button	POR_DISP_CHECKFUNDS_BUTTON	Function to control the display of the checkfunds button
Express Checkout	POR_EXPRESS_CHECKOUT	Performs Express Checkout
One Time Location	POR_ONE_TIME_LOCATION	Function security for entering a one time address during checkout
POR Power Checkout	POR_POWER_CHECKOUT	Power checkout option
POR Standard Checkout	POR_STANDARD_CHECKOUT	Performs Standard Checkout

**Table 2–16 Functions - Workflow**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
Self-Service Purchasing Receive Orders	POR_RCV_ORDERS_WF	Receive orders from Workflow

**Table 2–16 Functions - Workflow**

<b>Name</b>	<b>System Name</b>	<b>Description</b>
Self-Service Purchasing Resubmit Requisition	POR_RESUBMIT_URL	Resubmit requisition. Called from Workflow
Self-Service Purchasing Update/Cancel Requisition	POR_UPDATE_REQ	Update or cancel requisition lines. Called from Workflow notifications
Self-Service Purchasing View Requisition	POR_OPEN_REQ	View requisition. Called from WF

**Table 2–17 Obsoleted Functions**

<b>Name</b>	<b>System Name</b>
Receiving Home Page	
PO Receiving Function	
POR: Receive Items	
Emergency Req Add Approver	POR_EMERG_ADD_APPROVER
Emergency Req Change First Approver	POR_EMERG_CHANGE_FIRST_APPR
Emergency Req Change Multiple Lines	POR_EMERG_CHANGE_MULTI_LINES
Emergency Req Compare	POR_EMERG_COMP_SEARCH_RESULTS
Emergency Req Delete Results	POR_EMERG_DELETE_APPROVER
Create Emergency Requisitions	POR_EMERG_REQS
Emergency Req Sort Approvers	POR_EMERG_SORT_APPROVERS
Emergency Req Use Default Approver List	POR_EMERG_USE_DEFAULT_APPROVER
Emergency Req View Approvers	POR_EMERG_VIEW_APPROVERS
POR: Create New Requisition	POR_NEW_REQS
Create New Requisition	ICX_REQS
eContent Manager	POR_ECMANAGER
View All Reqs Complete	POR_VIEW_ALL_REQS_COMPLETE
View All Reqs Delete	POR_VIEW_ALL_REQS_DELETE
View Reqs I Approved Complete	POR_VIEW_APPR_REQS_COMPLETE
View Reqs I Approved Delete	POR_VIEW_APPR_REQS_DELETE

**Table 2–17 Obsolete Functions**

Name	System Name
View Reqs I Approved Resubmit	POR_VIEW_APPR_REQS_RESUBMIT
View My Group's Reqs Complete	POR_VIEW_GROUP_REQS_COMPLETE
View My Group's Reqs Delete	POR_VIEW_GROUP_REQS_DELETE
View My Requisitions	POR_VIEW_MY_REQS
View My Reqs Complete	POR_VIEW_MY_REQS_COMPLETE
View My Reqs Delete	POR_VIEW_MY_REQS_DELETE
View Reqs Cancel Expand	POR_VIEW_REQS_EXPAND_CANCEL
View Reqs Copy Expand	POR_VIEW_REQS_COPY_EXPAND
View Reqs Receive Expand	POR_VIEW_REQS_EXPAND_RECEIVE
View Reqs Resubmit Expand	POR_VIEW_REQS_EXPAND_RESUBMIT

### 2.6.3 Oracle iProcurement Menus

The following table lists the settings for menu security:

**Table 2–18 Oracle iProcurement Menus**

Menu	System Name	Name	Description
eContent Manager	POR_SSP_ECMANAGER	iProcurement eContent Manager	Allow a requester to access the iProcurement eContent Manager
Emergency Requisition	POR_CREATE_EMERG_REQ	Create Emergency Requisition	Menu security for access to the emergency requisition submenu
iProcurement Home	ICX_POR_SSP_HOME	iProcurement Home	Allow a requester access to the iProcurement home page
iProcurement: Logoff Menu	ICXPOR_LOGOFF_MENU	Logoff Menu	This menu includes the global menu and tabs when a requester logs in using Oracle iProcurement's direct login page. This includes all the submenus and functions related to receiving, catalog search and shopping lists pages.

**Table 2–18 Oracle iProcurement Menus**

<b>Menu</b>	<b>System Name</b>	<b>Name</b>	<b>Description</b>
iProcurement: Return to Portal Menu	ICXPOR_PORTAL_MENU	Return to Portal Menu	This menu includes the global menu and tabs when a requester logs in through the ICX login page. This includes all the submenus and functions related to receiving, catalog search and shopping lists pages.
iProcurement: Return to eAM Menu	ICXPOR_EAM_MENU	Return to EAM Menu	This menu includes the global menu and tabs when the requester launches Oracle iProcurement from the EAM application. This includes all the submenus and functions related to receiving, catalog search and shopping lists pages.
Power Checkout	POR_POWER_CHECKOUT	Self Service Purchasing Power Checkout	Allows access to iProcurement power checkout
Receiving	ICX_POR_ALL_ITEMS_TO_RECEIVE	SSP5 - All Items to Receive	Submenu to include a function to determine if a requester can view all items to receive
Receiving	ICX_POR_RECEIVE_ORDERS	SSP5 - Receiving	Submenu to include function to determine if a requester given access to receiving
Requisition Creation	ICX_POR_CREATE_REQ	Create Requisition	Allow access to iProcurement requisition creation
Requisition Creation	ICX_POR_EMERG_CREATE_REQ	SSP5 - Create Requisitions	Create requisitions function security submenu
View Requisitions	ICX_POR_SSP5_VIEW_ALL_REQS	SSP5 - View All Requisitions	iProcurement view all requisitions submenu
View Requisitions	ICX_POR_SSP5_VIEW_GROUP_REQ	SSP5 - View My Group's Requisitions	View my group's query submenu defined for function security
View Requisitions	ICX_POR_SSP5_VIEW_MY_REQ	SSP5 - View My Requisitions	iProcurement view my requisitions submenu

**Table 2–18 Oracle iProcurement Menus**

Menu	System Name	Name	Description
View Requisitions	ICX_POR_VIEW_TO_APPR_REQ	SSP5 - View Orders to Approve	iProcurement submenu for order to approve
View Requisitions	ICX_POR_SSP5_VIEW_APPR_REQ	SSP5 - View Requisitions I Approved	iProcurement submenu for orders I have approved page
Workflow Link	ICX_POR_WORKFLOW	Self Service Purchasing Workflow link	Allow a requester access to iProcurement workflow link

## 2.6.4 Data Security

Data security is achieved by using securing attributes to allow rows (records) of data to be visible to specified requesters based on the specific data contained in the row. In Oracle iProcurement, securing attributes, called realms, are used to restrict requester access to the catalog - either by item categories, or by punchout supplier sites.

The following table lists securing attributes can be used to establish data security in Oracle iProcurement:

**Table 2–19 iProcurement Securing Attributes**

Attribute	Application	Description
ICX_POR_ITEM_SOURCE_ID	Oracle Self Service Web Applications	No longer used. (If you used it in a previous release, the current release still honors it.)
RT_CATEGORY_ID	Oracle Self Service Web Applications	No longer used. (If you used it in a previous release, the current release still honors it.)
ICX_POR_REALM_ID	Oracle Self Service Web Applications	Use this attribute to secure the responsibility for category or item source realms.

For more information on using restricting the catalog using realms, see [Defining Realms](#) on page 3-64.

## 2.7 AK Regions

The appearance of the Oracle iProcurement pages are managed through different AK Regions. AK regions can be modified through the appropriate AK Developer responsibility. By modifying AK regions and attributes, the display of the associated pages in Oracle iProcurement will be affected. After changes are made to any AK region, the iAS must be restarted (stop, then start). The different AK Regions are listed in the tables that follow, along with each of their associated region descriptions.

**Table 2–20 Shopping Cart**

Page	AK Regions	Region Description
Non-Catalog Request	POR_SPORD_GOODS_R	Goods Billed By Quantity
Non-Catalog Request	POR_SPORD_RATE_R	Service Billed By Quantity
Non-Catalog Request	POR_SPORD_AMOUNT_R	Goods or Services Billed By Amount
Cart Contents Page - Full	POR_SHOPPING_CART_R	Shopping Cart Items
Approver Shopping Cart	POR_SHOPPING_CART_R	Shopping Cart Items

**Table 2–21 Checkout - Delivery Information**

Page	AK Regions	Region Description
Enter Delivery Information	POR_DELIVERY_SINGLE_ROW_R	Delivery Information For All Items
Line Items	POR_DELIVERY_MULTI_ROW_R	Edit Line Item Delivery Values - Multiple Row Display
Selected Line Item	POR_SELECTED_LINE_ITEM_R	Selected Line Item Information Table
Selected Line Item	POR_DELV_INFO_SELECTED_LINE_R	Edit Delivery Information For Selected Line Item
Saved Carts, Copied Requisitions, Approver Checkout	POR_CHECKOUT_DELIVERY_R	Checkout Delivery Information
Saved Carts, Copied Requisitions, Approver Checkout	POR_DELIVERY_MULTI_ROW_R	Checkout - Multiple Line Items
Enter One-Time Location	POR_ONE_TIME_LOCATION_R	Enter one-time location information

**Table 2–22 Checkout - Billing Information**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Enter Billing Information	POR_BILLING_SINGLE_ROW_R	Billing Information For All Items
Selected Line Item	POR_SELECTED_LINE_ITEM_R	Selected Line Item Information Table
Selected Line Item	POR_BILLING_LINE_DETAILS_R	Enter Billing Information For Selected Line Item
Individual Line Items	POR_BILLING_MULTI_ROW_R	Edit Line Item Billing Values - Multiple Row Display
Saved Carts, Copied Requisitions, Approver Checkout	POR_BILLING_ALTERNATIVE_R	Checkout Billing Information
Saved Carts, Copied Requisitions, Approver Checkout	POR_BILLING_MULTI_ROW_R	Multiple Line Billing Information
Edit Accounts	POR_SELECTED_LINE_ITEM_R	Selected Line Item Information Table
Edit Accounts	POR_BILLING_EDIT_ACCOUNTS_R	Edit Accounts For The Selected Line Item
Allocate Costs to Multiple Accounts	POR_SELECTED_LINE_ITEM_R	Selected Line Item Information Table
Allocate Costs to Multiple Accounts	POR_BILLING_MULT_ACCOUNTS_R	Enter Multiple Accounts For the Selected Line Item
Review Accounts	POR_BILLING_REV_ACCOUNT_R	Item Information Table With Associated Charge Account

**Table 2–23 Checkout - Other**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Attachments	POR_ADD_ATTACHMENTS_R	Add Attachments
Notes and Attachments	POR_NOTES_ATTACHMENTS_R	Enter Notes and Attachments
Notes and Attachments	POR_ATTACHMENTS_LIST_R	Attachments List
Review Approver List	POR_REVIEW_APPROVERS_R	Container Region
Review Approver List	POR_APPRV_LIST_R	List of Approvers
Review Approver List	POR_ATTACHMENTS_LIST_R	Justification Attachments List
Change First Approver	POR_CHG_FIRST_APPRV_R	Enter New First Approver

**Table 2–23 Checkout - Other**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Add New Approver - Approver List Existing	POR_CUR_APPRV_LIST_R	Current Approval List
Add New Approver - Approver List Existing	POR_ADD_NEW_APPRV_R	Add New Approver Fields
Add New Approver - No Approvers Exist	POR_ADD_FIRST_APPRV_R	Add First Approver Fields
Review and Submit Requisition - Collapsed	POR_FINAL_REV_CLPSED_R	Review Requisition Header
Review and Submit Requisition - Collapsed	POR_FINAL_REV_LINES_R	View Line Items
Review and Submit Requisition - Collapsed	POR_ATTACHMENTS_LIST_R	View Attachments List
Review and Submit Requisition - Expanded	POR_FINAL_REV_EXPND_R	Review Requisition Header
Review and Submit Requisition - Expanded	POR_ATTACHMENTS_LIST_R	View Attachments List
Review and Submit Requisition - Expanded	POR_REV_LINE_SUMMARY_R	View Summary of All Lines
Review and Submit Requisition - Expanded	POR_REV_LINE_DETAIL_R	View Line Details
Review and Submit Requisition - Expanded	POR_DIST_SUMMARY_R	View Account Information
Review and Submit Requisition - Printer Friendly	POR_PRNTR_FR_HEADER_R	Review Header Region
Review and Submit Requisition - Printer Friendly	POR_PRNTR_FR_LINES_R	Review Lines Region
Review and Submit Requisition - Printer Friendly	POR_ATTACHMENTS_LIST_R	Review Attachments List

**Table 2–24 Power Checkout**

<b>Page</b>	<b>AK Regions Region</b>	<b>Description</b>
Main Page	POR_POWER_ORDER_INFO_R	Requisition Information
Main Page	POR_ATTACHMENTS_LIST_R	Attachments List Table
Main Page	POR_POWER_LINE_ITEMS_R	Line Items
Edit Single Row	POR_POWER_SINGLE_ROW_R	Enter Checkout Information
Edit Single Row	POR_ATTACHMENTS_LIST_R	Attachments List Table
Edit Multiple Rows	POR_POWER_MULTIPLE_ROW_R	Enter Checkout Information
Edit Multiple Rows	POR_ATTACHMENTS_LIST_R	Attachments List Table

**Table 2–25 Express Checkout**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Express Checkout	POR_EXPRESS_CHECKOUT_R	Enter Checkout Information

**Table 2–26 Saved Cart**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Saved Carts	POR_SAVED_ORDERS_R	Saved Carts Table
View Saved Cart	POR_VIEW_CART_R	Cart Information
View Saved Cart	POR_SAVED_CART_R	Cart Items
Enter Cart Description	POR_CART_HEADER_R	Cart Description

**Table 2–27 Information Template**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Special Item Information	POR_ITEM_DESC_R	Special Item Information

**Table 2–28 Requisition Details**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Details - Collapsed Page	POR_OD_HEADER_R	View Requisition Information
Details - Collapsed Page	POR_OD_LINES_R	View Requisition Line Items Information
Details - Collapsed Page	POR_ATTACHMENTS_LIST_R	View Attachments List
Details - Expanded Page	POR_OD_EXPND_HEADER_R	View Requisition Information
Details - Expanded Page	POR_ATTACHMENTS_LIST_R	View Attachments List
Details - Expanded Page	POR_OD_LINE_SUMMARY1_R	View Requisition Line Item Summary
Details - Expanded Page	POR_OD_LINE_DETAIL_R	View Selected Requisition Line Item Details
Details - Expanded Page	POR_OD_LINE_SUMMARY2_R	View Requisition Line Item Summary
Details - Expanded Page	POR_DIST_SUMMARY_R	View Account Information
Details - Item Source	POR_SRC_EXTERNAL_R	Select source page external source region.
Details - Item Source	POR_SRC_INTERNAL_R	Select source page internal source region.
Details - Item Source	POR_SRC_ITEM_R	Select source page item region.

**Table 2–29 Requisition Status**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
Status - View Requisitions	POR_VIEW_ORDERS_R	View Requisitions
Status - Approvals	POR_VIEW_APPR_R	Requisitions to Approve Approve Requisitions
Status - Expanded Search (No Results)	POR_REQ_EXP_SRCH_R	Expanded Search Criteria
Status - Expanded Search (With Results)	POR_REQ_EXP_SRCH_R	Expanded Search Criteria
Status - Expanded Search (With Results)	POR_VIEW_ORDERS_R	View Requisition Information
Status - Approval History Page	POR_APPROVAL_HIST_R	View Approval History

**Table 2–30 Project Requisition Distributions**

<b>Page</b>	<b>Region</b>	<b>Region Change</b>
Req Distribution	POR_BILLING_SINGLE_ROW_R	POR_EXPENDITURE_ORG_ID (NEW)
Req Distribution	POR_BILLING_MULTI_ROW_R	POR_EXPENDITURE_ORG_ID (NEW)
Req Distribution	POR_BILLING_LINE_DETAILS_R	POR_ACCOUNT_NUMBER (OBSOLETE) POR_CHARGE_ACCT_SEG11...30 (OBSOLETE) POR_PROJECT (OBSOLETE) POR_TASK (OBSOLETE) POR_AWARD_NUMBER (OBSOLETE) POR_EXPENDITURE_ORG (OBSOLETE) POR_EXPENDITURE_TYPE (OBSOLETE) POR_EXP_ITEM_DATE (OBSOLETE) POR_PROJECT_ID (OBSOLETE) POR_TASK_IS (OBSOLETE) POR_AWARD_ID (OBSOLETE) POR_DATE_FORMAT (OBSOLETE)
Req Distribution	POR_POWER_SINGLE_ROW_R	POR_PRMPT_ADD_PROJECTS (New) POR_EXPENDITURE_ORG_ID (New)

**Table 2–30 Project Requisition Distributions**

<b>Page</b>	<b>Region</b>	<b>Region Change</b>
Req Distribution	POR_POWER_MULTIPLE_ROW_R	POR_PROJECT (Obsolete) POR_PROJECT2 (Obsolete) POR_PROJECT_HIDDEN (Obsolete) POR_TASK (Obsolete) POR_TASK2 (Obsolete) POR_TASK_HIDDEN (Obsolete) POR_PROJECT_ID (Obsolete) POR_TASK_ID (Obsolete) POR_AWARD_NUMBER (Obsolete) POR_AWARD_ID (Obsolete) POR_EXPENDITURE_TYPE (Obsolete) POR_EXPENDITURE_ORG (Obsolete) POR_EXP_ITEM_DATE (Obsolete) POR_DATE_FORMAT1 (Obsolete)
Req Distribution	POR_DIST_SUMMARY_R	POR_PROJECT (New) POR_TASK (New) POR_EXPENDITURE_TYPE (New) POR_EXP_ITEM_DATE (New) POR_EXPENDITURE_ORG (New) POR_AWARD_NUMBER (New) POR_ATTRIBUTE_1.15 (New)

**Table 2–30 Project Requisition Distributions**

<b>Page</b>	<b>Region</b>	<b>Region Change</b>
Req Distribution	POR_OD_LINE_DETAIL_R	POR_PROJECT (Obsolete) POR_TASK (Obsolete) POR_EXPENDITURE_TYPE (Obsolete) POR_EXP_ITEM_DATE (Obsolete) POR_EXPENDITURE_ORG (Obsolete) POR_AWARD_NUMBER (Obsolete) POR_ATTRIBUTE_1..15 (Obsolete)
Req Distribution	POR_REV_LINE_DETAIL_R	POR_PROJECT (Obsolete) POR_TASK (Obsolete) POR_EXPENDITURE_TYPE (Obsolete) POR_EXP_ITEM_DATE (Obsolete) POR_EXPENDITURE_ORG (Obsolete) POR_AWARD_NUMBER (Obsolete) POR_ATTRIBUTE_1..15 (Obsolete)
Req distirbution	POR_PRNTR_FR_LINES_R	POR_PROJECT (Obsolete) POR_TASK (Obsolete) POR_EXPENDITURE_TYPE (Obsolete) POR_EXP_ITEM_DATE (Obsolete) POR_EXPENDITURE_ORG (Obsolete) POR_AWARD_NUMBER (Obsolete) POR_ATTRIBUTE_1..15 (Obsolete)

**Table 2–31 My Profile**

<b>Page</b>	<b>AK Regions</b>	<b>Region Description</b>
My Profile	POR_MY_PROFILE_R	User Preferences

## 2.8 Technology Stack Upgrade

Starting in Procurement Family Pack H, Oracle iProcurement includes a technology upgrade. The following components in Oracle iProcurement has been migrated to Self-Service Framework technology (OA Framework) to take advantage of the new metadata model, advanced UI interactivity and personalization features:

- iProcurement Home page
- Catalog Search
- Desktop Receiving
- Notification worklist

Note that the impact of this upgrade is that the above pages no longer use the AK Developer technology for customization. That process is made easier for the implementor and the end requester with this new framework.

Please review the *OA Framework Personalization and Extensibility Guide* available from Oracle MetaLink for complete details on Self-Service Framework technology.

## 2.9 Workflow

Oracle Workflow enables you to automate business processes by routing information according to customizable business rules. Workflows automate several procedures in Oracle Purchasing 11*i* and Oracle iProcurement 11*i* and are shared by these products.

This section presents a brief description of each pre-defined workflow used by Oracle iProcurement 11*i*. These workflows are:

- PO Requisition Approval
- PO Create Documents
- PO Account Generator
- PO Send Notifications for Purchasing Documents
- PO Confirm Receipts
- PO Tolerance Check for PO Change Request
- PO Change Order

Each of these approval workflows consists of processes that are viewable in the Oracle Workflow Builder. Each workflow process, in turn, consists of individual function activities that can be tailored to support your business practices.

For detailed information on these workflows see the *Oracle Purchasing User's Guide*. For information on the procedures for setting them up see the *Oracle Workflow Guide*.

### 2.9.1 PO Requisition Approval

**Workflow Filename:** poxwfrqa.wft

This workflow manages all requisition approvals and is initiated when you submit a requisition in Oracle iProcurement 11*i*. Approvers, upon receipt of the approval notification (via web or e-mail), may select either approve, reject, forward, or reassign the requisition. If approved, the notification passes to the next approver until all approvers have acted on the requisition. Finally, when all approvers have approved the requisition, the workflow process submits the requisition to the buyer or purchasing department. If you have the appropriate security access, you can view the approvers list and override the default approver list.

Customize the attributes in this workflow to fit your business needs. The key attribute that requires consideration is if a deferred process is created at the very

end of the requisition approval workflow. That deferred process defers the call to the PO Create Documents workflow. This is accomplished by modifying the workflow attributes in the PO Requisition Approval workflow. See the *PO Requisition Approval* section of the *Oracle Purchasing User's Guide* for details.

## 2.9.2 PO Create Documents

**Workflow Filename:** poxwfatc.wft

This workflow manages the automatic creation of purchasing documents. PO Create Documents workflow is initiated in iProcurement when you submit a requisition associated to an existing blanket purchase order, contract purchase agreement, or catalog quotation in Oracle Purchasing.

Customize the attributes in this workflow to fit your business needs. This is accomplished using the following parameters in the PO Create Documents workflow. The attributes you must consider are listed in the following table:

**Table 2–32 Automatic Document Creation Attributes**

Attributes: Display name	Attributes: Internal name	Description
Is Automatic Creation Allowed?	AUTOCREATE_DOC	Indicator (Y for Yes or N for No) of whether this workflow is initiated for all approved requisition lines. <i>Default Value:</i> N
Is Automatic Approval Allowed?	AUTO_APPROVE_DOC	Indicator (Y for Yes or N for No) of whether the purchase order approval workflow is initiated automatically after this workflow. <i>Default Value:</i> N
Should Workflow Create The Release?	CONT_WF_FOR_AC_REL_GEN	Indicator (Y for Yes or N for No) of whether this workflow creates releases or leaves them to you to create using AutoCreate <i>Default Value:</i> N
Should Contract be used to autcreate Doc?	USE_CONTRACT_FLAG	Indicates whether the workflow should autcreate standard purchase orders with contract purchase agreement references. <i>Default Value:</i> No

**Table 2–32 Automatic Document Creation Attributes**

Attributes: Display name	Attributes: Internal name	Description
Is Contract Required on Requisition Line?	CONTRACT_REQUIRED_FLAG	Indicates whether a contract purchase agreement must exist on the requisition line for autocreation to generate a standard PO. (Accomplished by associating a contract purchase agreement with an item using bulk loading, punchout, or transparent punchout.).  <i>Default Value: No</i>
Should non-catalog requests be autosourced from contract?	INCLUDE_NON_CATALOG_REQ_FLAG	If the <i>Is Contract Required on Requisition Line?</i> option is set to <i>No</i> , use this attribute to indicate whether the workflow should search for a contract purchase agreement with which to associate non-catalog requests.  <i>Default Value: No</i>
Is Grouping of Requisition Line Allowed?	GROUPING_ALLOWED_FLAG	Indicates whether the workflow should group all lines from a single requisition to a single purchase order. If this option is set to <i>No</i> , each requisition line becomes a separate purchase order.  <i>Default Value: No</i>
Is Grouping of One Time Address Line Allowed?	GROUP_ONE_ADDR_LINE_FLAG	Indicates whether the workflow should group all requisition lines for the same one time address (on a single requisition) to a single purchase order. If this option is set to <i>No</i> , each requisition line becomes a separate purchase order.  <i>Default Value: No</i>

See the Workflow section of the *Oracle Purchasing User's Guide* for details on this workflow and these attributes.

### 2.9.3 Account Generator

**Workflow Filename:** poxwfpag.wft

During checkout, the Oracle Purchasing Account generator builds a charge, budget, accrual, and variance account for each purchase order, release, and requisition distribution based on the distribution's destination type. Once an account has been

determined for a requisition distribution, the Account Generator populates all segments of the account.

Customize the attributes in this workflow to fit your business needs. This is accomplished by modifying the workflow attributes in the PO Account Generator workflow. See the *Account Generator Workflow* section of the *Oracle Purchasing User's Guide* for details.

## 2.9.4 PO Send Notifications for Purchasing Documents

**Workflow Filename:** poxwfarm.wft

The PO Send Notifications for Purchasing Documents workflow looks for documents that are incomplete, rejected, or in need of re-approval and sends notifications of the document's status to the appropriate people. You can view and respond to these notifications through the e-mail, your worklist, or the Notifications Summary in Oracle iProcurement 11i.

Customize the attributes in this workflow to fit your business needs. This is accomplished by modifying the workflow attributes in the PO Send Notifications for Purchasing Documents workflow. See the PO Send Notifications for *Purchasing Documents Workflow* section of the *Oracle Purchasing User's Guide* for details.

## 2.9.5 Confirm Receipts

**Workflow Filename:** poxwfrcv.wft

The Confirm Receipts workflow sends notifications through the Web, e-mail, or Notifications Summary window to requesters or buyers who create requisitions through Oracle iProcurement 11i.

The Confirm Receipts workflow sends notifications for PO shipments that meet the following criteria:

- Destination or Deliver-To Type is Expense.
- Destination type is Inventory, if the profile option POR: Select Inventory Replenishment Lines for Confirm Receipts is set to Y.
- Receipt routing is Direct Delivery.
- Matching is 3-way or 4-way.
- Need-By Date/Promised Date is prior to the current date.

Customize the attributes in this workflow to fit your business needs. This is accomplished by modifying the workflow attributes in the Confirm Receipts workflow. See the *Confirm Receipts* section of the *Oracle Purchasing User's Guide* for details.

## 2.9.6 PO Tolerance Check for PO Change Request

**Workflow Filename:** poxrcoa.wft

The PO Change Request Tolerance Check workflow package provides the administrator the capability to customize the business rules for routing of the change request through the Oracle iProcurement user's approval hierarchy.

Customize the attributes in this workflow to fit your business needs. This is accomplished by modifying the workflow attributes in the Tolerance Check for PO Change Request workflow.

## 2.9.7 PO Change Order

**Workflow Filename:** poschord.wtf

The PO Change Order workflow package provides the ability for a requester to submit a change request to an approved purchase order. The buyer receives a notification of the change request details and is able to review and respond to the change request.

## 2.10 Custom Packages

Oracle iProcurement 11*i* enables you to incorporate your proprietary business logic into the application using a PL/SQL package that is bundled in the PORCUSTB.pls file. In Oracle Procurement Family Pack H or earlier, the profile POR: Enable Requisition Line Customization was used to control if any custom code in the POR\_CUSTOM\_PKG needs to be invoked during the requisition creation. Starting in Oracle Procurement Family Pack I, a new profile (POR: Enable Req Distribution Customization) has been introduced to control if any distribution related custom code in the POR\_CUSTOM\_PKG needs to be invoked during the requisition creation. The profile POR: Enable Requisition Line Customization can still be used to control if any requisition line related custom code needs to be invoked. There are two types of customizations that can be achieved through this package:

- Customization of the defaulting and validation logic when creating requisitions both at the header and line level.
- Customization of the defaulting and validation logic for accounts that are used on the requisition lines.

### 2.10.1 Requisition Header/Line Customizations

The POR\_CUSTOM\_PKG provides customization hooks to perform the defaulting logic and validation of the requisition header and line data. These procedures are invoked from the class ReqCustom and by default do not impact the existing logic and validation. To invoke the custom procedures for line data, the profile POR: Is Line Customization Enabled should be set to true.

The following table describes the different procedures provided in the POR\_CUSTOM\_PKG for requisition header and line customizations and how they are triggered.

CUSTOM\_DEFAULT\_REQ\_DIST  
**Table 2–33 Requisition Header/Line Procedures**

Procedure Name	Purpose	Invocation Details
CUSTOM_DEFAULT_REQ_HEADER	This procedure can be customized to include logic to default the header information for a given requisition.	This procedure is called from defaultHeader in ReqCustom. This is called when a new line is added to the shopping cart.
CUSTOM_VALIDATE_REQ_HEADER	This procedure can be customized to include logic to validate the header information for a given requisition.	This procedure is called from validateHeader in ReqCustom. This is called on every page in the checkout flow.
CUSTOM_DEFAULT_REQ_LINE	This procedure can be used to include logic to default the information onto a requisition line.	This procedure is called from defaultLine in ReqLine. This is called when a new line is added to the shopping cart.
CUSTOM_VALIDATE_REQ_LINE	This procedure can be used to include logic to validate the information on the requisition line.	This is called from customValidateLine in ReqCustom. This is called on every page in the checkout flow.
CUSTOM_DEFAULT_REQ_DIST	This procedure can be used to include logic to default the information onto a requisition distribution.	This procedure is called from defaultDist in ReqLine. This is called when a new line is added to the shopping cart.
CUSTOM_VALIDATE_REQ_DIST	This procedure can be used to include logic to validate the information on the requisition distribution.	This is called from customValidateDist in ReqCustom. This is called on every page in the checkout flow.

## 2.10.2 Account Generator Customizations

In addition to tailoring the Account Generator workflow to your business practices, you can use the POR\_CUSTOM\_PKG to provide additional customizations to the default account generation and account validation procedures. You can customize this procedure to add logic for validating charge account, accrual account, and variance account if encumbrance is not active. If encumbrance is being used you can customize this procedure to add logic for validating the budget account in addition to those mentioned.

The following table describes the different procedures provided in the POR\_CUSTOM\_PKG for account generator customizations and how they are triggered.

**Table 2–34 Account Generator Procedures**

Procedure Name	Purpose	Invocation Details
CUSTOM_BUILD_REQ_CHARGE_ACCT	This procedure can be used to generate the default charge account to be used on a given requisition line.	This procedure is called from defaultChargeAccount in ReqCustom. This is called when a new line is added to the shopping cart.
CUSTOM_BUILD_REQ_ABV_ACCT	This procedure can be used to generate the default accrual, variance, and budget account to be used on a given requisition line.	This procedure is called from defaultABVAccount in ReqCustom. This is called when a new line is added to the shopping cart.  <b>Note:</b> This procedure is not used in Oracle iProcurement 11i. Instead, use the Account Generator workflow to provide information regarding accrual, variance, and budget accounts.
CUSTOM_VALIDATE_GL_ACCOUNT	This procedure can be customized to include logic to validate the charge account that is specified for the given requisition line.	This procedure is called from validateGLAccount in ReqCustom. This is called both when the account is built using the account generator as well as when entered by the requester.

### Using Descriptive Flexfields to Trigger the Account Generator Workflow

You can use a descriptive flexfield (DFF) to invoke the account generator workflow when there are changes to the value captured in the flexfield. This is achieved by enabling a DFF at the requisition line level and using the SET\_REBUILD\_DIST\_VALUE in the POR\_CUSTOM\_PKG as described in the following table:

**Table 2–35 Account Generator from DFFs**

Procedure Name	Purpose	Invocation Details
SET_REBUILD_DIST_VALUE	This procedure can be used when the you wish to specify certain DFFs as triggering points to the accounting workflow. As a result, when the value of this DFF changes, the account gets rebuilt.	This is called from setRebuildDistValue in ReqCustom. This is called on every page in the checkout flow.

This procedure checks the old and new values for the DFF that triggers the account generator workflow and returns a Y value if the value of the DFF has changed.

For example, assume that there is a DFF, POR\_ATTRIBUTE\_1, at the requisition line level which is one of the input arguments to the account generator workflow.

The business requirement is that the account generator workflow is triggered whenever the value for this DFF changes. The customization that needs to be done in SET\_REBUILD\_DIST\_VALUE is as follows:

```

PROCEDURE SET_REBUILD_DIST_VALUE (
    line_att1          IN    VARCHAR2, -- 1
    line_att2          IN    VARCHAR2, -- 2
    line_att3          IN    VARCHAR2, -- 3
    line_att4          IN    VARCHAR2, -- 4
    line_att5          IN    VARCHAR2, -- 5
    line_att6          IN    VARCHAR2, -- 6
    line_att7          IN    VARCHAR2, -- 7
    line_att8          IN    VARCHAR2, -- 8
    line_att9          IN    VARCHAR2, -- 9
    line_att10         IN    VARCHAR2, -- 10
    line_att11         IN    VARCHAR2, -- 11
    line_att12         IN    VARCHAR2, -- 12
    line_att13         IN    VARCHAR2, -- 13
    line_att14         IN    VARCHAR2, -- 14
    line_att15         IN    VARCHAR2, -- 15
    attribute1         IN    VARCHAR2, -- 16
    attribute2         IN    VARCHAR2, -- 17
    attribute3         IN    VARCHAR2, -- 18
    attribute4         IN    VARCHAR2, -- 19
    attribute5         IN    VARCHAR2, -- 20
    attribute6         IN    VARCHAR2, -- 21
    attribute7         IN    VARCHAR2, -- 22
    attribute8         IN    VARCHAR2, -- 23
    attribute9         IN    VARCHAR2, -- 24
    attribute10        IN    VARCHAR2, -- 25
    attribute11        IN    VARCHAR2, -- 26
    attribute12        IN    VARCHAR2, -- 27
    attribute13        IN    VARCHAR2, -- 28
    attribute14        IN    VARCHAR2, -- 29
    attribute15        IN    VARCHAR2, -- 30
    returnvalue        OUT   VARCHAR2, -- 31
    x_return_code      OUT   NUMBER, -- 0 no error
    x_error_msg        OUT   VARCHAR2 -- 33
)
IS
BEGIN
    X_RETURN_CODE:=0;
    X_ERROR_MSG:=' ';

    if ((line_att1 is NULL and attribute1 <> NULL)

```

```
        OR (attribute1 is NULL and line_attr1 <> NULL)
          OR (line_attr1 <> attribute1)) THEN
    returnvalue := "Y";
```

```
END;
```

The parameter `line_attr1` is the old value for the attribute `POR_ATTRIBUTE_1` while `attribute1` is the new value of the same attribute. The above code checks for any change in the attribute `POR_ATTRIBUTE_1` and populates `returnvalue` accordingly.

## 2.11 Online Help

The online help is available as Oracle Applications Help. All the help documents and graphic files are stored in the database. The help documents are in HTML format. You may modify the help content by using any commercial HTML editor.

Refer to the *Oracle Applications System Administrator's Guide* for detailed instructions on modifying and updating these help files.



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# Catalog Management

This chapter discusses the implementation steps specific to catalogs in Oracle iProcurement. The following topics are included:

- [Stores and Catalogs](#) on page 3-2
- [Creating and Maintaining Local Content](#) on page 3-14
- [Setting Up Contract AutoSourcing](#) on page 3-43
- [Managing Images](#) on page 3-50
- [Defining Realms](#) on page 3-64

## 3.1 Stores and Catalogs

Oracle iProcurement uses stores and catalogs to organize items for requesters, as shown in [Figure 3-1](#). Each store contains one or more catalogs of items (see [Types of Catalogs](#) on page 3-3). When requesters search, Oracle iProcurement searches across all catalogs in the store and displays the results. (You search one store at a time.)

Grouping similar catalogs into a single store provides the following benefits:

- Provides logical groupings. In some cases, requesters may understand store groupings better than categories, which may be too technical or granular for requesters.
- Produces more relevant search results. For example, searching for *battery* can return *AAA battery*, *industrial battery*, and *notebook computer battery*. If, however, each battery is in a separate catalog and you segment the catalogs by store, the notebook computer battery can belong to a Computer Supplies store. Searching for a battery in the Computer Supplies store returns only computer batteries.

The requester can search My Favorite Store directly or click a store to search that store specifically. (The requester chooses My Favorite Store on the [My Profile](#) page.)

Figure 3-1 Shop Page

**ORACLE**  
iProcurement

Change My Favorite Store if desired

Return to Portal Shopping Cart Help

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

### Shop

**My Favorite Store**

Office Supplies  
Office supplies  
Search Office Supplies

Search the favorite store directly

Click another store to search it

**Other Stores**

- Computer Supplies**  
Computer hardware and supplies
- Wireless**  
Phones, pagers & services
- Legal Services**  
Immigration, contract review
- Gifts and Promotional Items**  
Gifts for customers
- Industrial Supplies**  
Lightweight industrial related products

**Shopping Cart**

You have saved carts.  
Click here to view your saved carts.

**Purchasing News**

- Check frequently asked questions
- Review purchasing policies

March 6, 2000.

This is where the customer puts their own purchasing news items (this is an HTML plugin).

**Catalog Language**

Your current catalog language: American English  
[Change Catalog Language](#)

**Manage Requisitions**

**Requisitions at a Glance**

Requisition	Description	Status
10650	folders	Approved
10649	paper	Approved
10648	pens	Approved
10647	printer paper	Approved
<a href="#">More...</a>		

**To-Do List**

Going Away? [Click here to reassign your notifications.](#)

- RFQ 14233 requires your approval

**TIP** Can't find the item? Try the following options:  
[Browse Categories](#)  
[Browse My Favorites List and Other Shopping Lists](#)  
[Create a Non-Catalog Request](#)

Shop | [Requisition Status](#) | [Receiving](#) | [My Profile](#) | [Return to Portal](#) | [Shopping Cart](#) | [Help](#) | [Diagnostics](#)

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### 3.1.1 Types of Catalogs

Oracle iProcurement supports the following types of catalogs:

- Local catalog (also known as the base catalog)
- Punchout catalog hosted by a supplier or marketplace
- Transparent punchout catalog hosted by a supplier or marketplace
- Informational catalog

### **Local Catalog**

There are two sources for data residing in the local catalog. One of these sources is your internal procurement system. Using the catalog extractor, data from purchasing documents such as blanket purchase agreements and requisition templates can be made available to requesters in Oracle iProcurement. The other source for local content is data loaded directly into Oracle iProcurement through the catalog bulk loader. This data may have originated from a supplier or third-party content management service, downloaded from Exchange.Oracle.com, or created internally.

### **Punchout Catalog Hosted by Supplier or Marketplace**

While creating a requisition, requesters can punch out directly to an Oracle Exchange marketplace, such as Exchange.Oracle.com, or to a supplier's Web store (to access supplier-hosted catalogs). After selecting items for purchase, requesters return to Oracle iProcurement to add additional items to their cart and check out as they normally do. For more information on setting up punchout, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*.

### **Transparent Punchout Catalog Hosted by Supplier or Marketplace**

A transparent punchout catalog (also known as a distributed search) allows requesters to search for items on an external site without leaving Oracle iProcurement. Unlike punchout, requesters do not access the site directly. Instead, when the requester searches for items, the transparent punchout works in the background to access the remote catalog and returns the matching items directly to the search results in Oracle iProcurement. Requesters do not necessarily know the items came from an external site. From the **Search Results** page, requesters add the items returned from the transparent punchout to their shopping cart and check out as they normally do.

From Oracle iProcurement, you can set up a transparent punchout to a supplier site or to an Oracle Exchange marketplace, such as Exchange.Oracle.com. For more information, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*.

## Informational Catalog

An informational catalog enables you to provide to requesters instructions or links for ordering items or services that may not fit into the other catalog types. For example, your company may already have internal Web pages containing purchasing information for employees. You can use the informational catalog as the starting point for accessing those pages. The informational catalog enables Oracle iProcurement to be your company's portal for all ordering.

You can create informational catalogs in the eContent Manager. (Use the iProcurement Catalog Administration responsibility to access the eContent Manager.) For instructions, click the Help icon in the eContent Manager.

### 3.1.2 Choosing a Catalog Type

Different items and commodities are better suited to one catalog type over another; however, there is no one-size-fits-all solution to catalog management. The following table provides guidance on the commodities best suited to the different catalog types, but ultimately you and the supplier decide on the best approach. You can use one or more catalog types to suit your processes.

**Table 3–1 Catalog Types Compared**

Catalog Type	Commodity (Types of Items)
Local catalog	<p>Best suited for direct material, such as mass-produced mechanical parts; products with prenegotiated or stable prices; items for which blanket purchase agreements and quotations already exist in Oracle Purchasing (which can be extracted to the local catalog); or indirect material that you want to manage locally (rather than using a punchout or transparent punchout) so that you have more control over the pricing and descriptions.</p> <p>Use for items you want to manage locally.</p>
Punchout	<p>Best suited for indirect material requiring a high degree of configuration (such as computer hardware or office furniture) and specialized services (such as printing or media services). For example, the supplier site may have special features unique to the industry that the punchout can use. (In an XML punchout, the supplier can also link its items to contract purchase agreements in Oracle Purchasing.)</p> <p>The supplier controls the content, searching, and the user interface for selecting items.</p>

**Table 3-1 Catalog Types Compared**

<b>Catalog Type</b>	<b>Commodity (Types of Items)</b>
Transparent punchout	<p>Best suited for indirect material with fluctuating prices, or extremely large or specialized catalogs that you want the supplier to manage. (The supplier can also link its items to contract purchase agreements in Oracle Purchasing.)</p> <p>The supplier controls the content and the search engine, but the requester never leaves Oracle iProcurement while searching and shopping.</p>
Informational catalog	<p>Best suited to provide requesters with instructions or links for ordering items that are not provided by the other catalog types. Enables Oracle iProcurement to be a portal for all ordering.</p>

Other functional differences between the catalog types include the following:

- For differences in the search features that different catalog types support, see [Supported Search Methods by Catalog Type](#) on page D-13.
- Both local and transparent punchout catalogs support item images and item comparisons. (Punchout catalog items are controlled by the supplier, so the ability to view images and comparisons depends on the supplier's site. A punchout to an Oracle Exchange marketplace automatically supports item images, if the supplier provides them, and item comparisons.)
- In a local catalog, the buying company can create additional base and local descriptors using bulk loading. (See the bulk loading appendices later in this guide.) In a punchout or transparent punchout, the supplier or marketplace provides the minimally required base descriptors.
- A punchout or transparent punchout to an Oracle Exchange marketplace can provide different prices for the same item that are visible only to certain operating units if you perform the multiple organizations setup described in the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*. The local catalog provides even more functionality for creating item information that is unique to an operating unit. (On an Oracle Exchange marketplace, only the item's price can vary by operating unit. In the local catalog, the entire item can vary; it can exist in some operating units, but not others, or its descriptive information can vary by operating unit.)
- The local catalog allows you to restrict different requesters' access to categories. Punchout, transparent punchout, or informational catalogs allow you to restrict access to them at the catalog level. (See [Defining Realms](#) on page 3-64.)

### 3.1.3 Example Stores and Catalogs

In the following example, you create seven catalogs and three stores. An X indicates whether the catalog is included in the store.

The example also shows how you can segment the local catalog by supplier, if desired. Segmenting the local catalog by supplier is helpful if you want to place local catalogs in separate stores as shown in this example. For instructions on segmenting the local catalog, use the iProcurement Catalog Administration responsibility to access the eContent Manager and click the Help icon.

**Table 3–2 Example Catalogs and Stores**

Catalog Name	Catalog Type	Store: Computer Supplies	Store: Office Supplies	Store: Wireless Supplies
Approved Computer Supplies	Local (for Computer Supplier, Inc. items only)	X		
Standard Office Supplies	Local (for Office Supplier, Inc. items only)		X	
All Paper Supplies	Transparent punchout		X	
Business Cards	Punchout		X	
Arch Wireless	Punchout			X
AT&T Wireless	Punchout			X
Wireless Services	Informational			X

In this example, when the requester accesses the **Shop** page, all the available stores are displayed. [Figure 3–1](#) shows the stores in this example, plus other stores.

The following illustration shows what happens when the requester clicks the Office Supplies store:

Figure 3–2 Shop Store Page

ORACLE<sup>®</sup> iProcurement

Return to Portal | Shopping Cart | Help | Diagnostics

Shop | Requisition Status | Receiving | My Profile

Stores | Categories | Shopping Lists | Non-Catalog Request

Search Office Supplies   [Shop Other Stores](#)

### Shop Office Supplies

These items consist of the lowest priced, most commonly selected supplies. All employees are encouraged to restrict their requests to these items whenever possible.

#### Available Catalogs

Enter keywords in the search field above and press the Go button to search the following available catalogs.

Name	Description
<a href="#">Standard Office Supplies</a>	Pens, clipboards, whiteboards, clips, containers, and other non-paper supplies
<a href="#">All Paper Supplies</a>	Folders, pads, sticky notes, and other paper supplies
<a href="#">Business Cards</a>	Order business cards here

#### Shopping Cart

You have saved carts.  
[Click here to view your saved carts.](#)

#### Compare Items

No items selected.

#### Catalog Language

Your current catalog language:  
 American English  
[Change Catalog Language](#)

Shop | Requisition Status | Receiving | My Profile | Return to Portal | Shopping Cart | Help | Diagnostics

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If a URL was specified for a punchout or informational catalog during setup of the catalog, the catalog name appears as a link. (Local or transparent punchout catalog names are never linked.) Requesters can search all three catalogs by entering a search keyword into the Search field, or they can click a catalog link to go to the punchout or informational catalog site.

If the requester searches a store and the store contains more than one catalog, a **Search Results Summary** page displays, dividing the results among each catalog, as shown in [Figure 3–3](#).

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**Note:** For illustrative purposes, the following illustration shows just one search result for the local and transparent punchout catalogs. Oracle iProcurement actually displays the first three search results from each catalog on the **Search Results Summary** page.

---



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Figure 3-3 Search Results Summary Page

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help Diagnostics

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request


Search Office Supplies   [Shop Other Stores](#)

### Search Results Summary from Standard Office Supplies: legal

[Hide Images](#) [View all results from Standard Office Supplies](#) **Local catalog search results**

Standard Classification Folders, Legal, Blue

Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.



Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0008**  
 Manufacturer: **National Supplies** Manufacturer Item:  
 Price: **4.95 USD** Unit: **Each**

Quantity

**Shopping Cart**  
 You have saved carts.  
[Click here to view your saved carts.](#)

**Compare Items**  
 No items selected.


**Catalog Language**  
 Your current catalog language:  
 American English  
[Change Catalog Language](#)

### Search Results Summary from All Paper Supplies: legal

[Hide Images](#) [View all results from All Paper Supplies](#) **Transparent punchout catalog search results**

Hanging Partition Fastener Folders, Ruby Red

Durable 25-point pressboard covers in 4 bright colors. 6 separate filing sections for legal documents and printouts. Sturdy kraft dividers with strong metal fasteners. Tear-resistant Tyvek gussets allow for 2 1/4" expansion. Adjustable tab for easy identification.



Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0007**  
 Manufacturer: **National Supplies** Manufacturer Item:  
 Price: **5.99 USD** Unit: **Each**

Quantity


**Punchout catalog search results**

### Search Results Summary from Business Cards: legal

[Hide Images](#)

Business Cards

Order business cards here



The Search Results Summary page works as follows for each catalog type:

- A local catalog (such as Standard Office Supplies in [Figure 3-3](#)) returns the first three items on the **Search Results Summary** page that match the search. If no matching items are found, a “no results found” message displays for the local catalog.
- A transparent punchout catalog (such as All Paper Supplies in [Figure 3-3](#)) displays the first three matching search results or “no results found” on the **Search Results Summary** page, just like the local catalog.
- A punchout catalog (such as Business Cards in [Figure 3-3](#)) displays a link (and, if you set it up, an image) on the **Search Results Summary** page if the search keywords the requester enters match the keywords defined for the punchout when you set it up.
- An informational catalog displays a link (and, if you set it up, an image) on the **Search Results Summary** page if the keywords match, just like the punchout catalog.

For local and transparent punchout catalogs, a link at the top of each section on the **Search Results Summary** page takes the requester to a detailed **Search Results** page, which lists all of the matching items in that catalog, as shown in [Figure 3-4](#).

Figure 3-4 Search Results Details Page

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

Search Office Supplies  Go [Advanced Search](#) [Shop Other Stores](#)

### Search Results from Standard Office Supplies: legal

Search results filtered by: **No active filter.** [Add Filter](#) [Remove All Filters](#)

[Hide Images](#) Sort by   Ascending  Descending [Go](#)

[Previous](#) [Next 5](#)

[Standard Classification Folders, Legal, Blue](#)

 Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gusssets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.

Category: <b>File Folders</b>	Supplier: <b>Acme Supplies</b>	Supplier Item: <b>FDR-0008</b>
Manufacturer: <b>National Supplies</b>	Manufacturer Item:	Contract Number:
Price: <b>4.95 USD</b>	Unit: <b>Each</b>	

Quantity  [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

[Legal Folders](#)

 Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FLR-1112**

Manufacturer: <b>National Supplies</b>	Manufacturer Item:	Contract Number:
Price: <b>.95 USD</b>	Unit: <b>Each</b>	

Quantity  [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

**Shopping Cart**

You have saved carts.  
[Click here to view your saved carts.](#)

[Proceed to Checkout](#)

**Compare Items**

No items selected.

[Clear](#) [Compare](#)

**Catalog Language**

Your current catalog language:  
American English

[Change Catalog Language](#)

From the **Search Results Summary** or **Search Results** pages, the requester can add the items to the shopping cart.

### 3.1.4 Getting Started

Get started with catalog management by creating catalogs and (optionally) stores.

#### Setup Steps

1. Determine which catalog type or types to implement: local, punchout, transparent punchout, or informational.

See [Types of Catalogs](#) on page 3-3.

2. Create your catalog or catalogs.
  - To create a local catalog, see [Creating and Maintaining Local Content](#) on page 3-14.
  - To create a punchout or transparent punchout catalog, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*.
  - To create an informational catalog, use the iProcurement Catalog Administration responsibility to access the eContent Manager. In the eContent Manager, click the Help icon and look for instructions on managing catalogs and stores.
3. Decide whether you will create more than one store in which to group your catalogs.

See [Stores and Catalogs](#) on page 3-2.
4. Optionally create stores to group the catalogs.

For instructions on creating stores and adding catalogs to them, use the iProcurement Catalog Administration responsibility to access the eContent Manager. Click the "Manage Stores" link. Click the Help icon for instructions.
5. If you want to control access to catalog content, see [Defining Realms](#) on page 3-64.
6. If you want to associate images with catalogs, stores, or items, see [Managing Images](#) on page 3-50.

### **Profile Options**

It is recommended that you leave POR: My Favorite Store at the default setting of -1 during implementation. When this profile option is set to -1, Oracle iProcurement automatically displays the store that has the lowest sequence number (you set the sequence when defining the store) and that the requester has access to, if you use realms to control catalog access. This way, you do not have to remember whether the requester has access to the favorite store.

For a list of profile options that affect search behavior, see [Profile Options](#) on page D-16.

### **AK Regions/Attributes**

Not applicable

## Function Security

None, but you can optionally use realms to control access to catalogs within a store. See [Defining Realms](#) on page 3-64.

## Workflow

None

## Implementation Considerations

Note the following about creating stores:

- Oracle iProcurement provides a default store, called the Main Store, if you do not wish to set up stores.
- Every punchout, transparent punchout, or informational catalog must be assigned to a store to be searchable. The local catalog is already in the Main Store by default, although you can assign it to any store. (If you are upgrading from a previous release, your punchout catalogs, if any, are also automatically included in the Main Store; the upgrade process also creates an additional store to house each punchout. Therefore, after upgrading, existing punchout catalogs are available in both the Main Store and their own individual stores. You can change this configuration if desired.)
- A catalog can be in multiple stores.
- The more transparent punchout catalogs in a store, the slower the performance may be, depending on factors such as network and Internet traffic and the external site's performance.

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**Note:** A store can contain more than one catalog of the same type, such as two punchout catalogs, with one exception: to maximize searching performance, a store can have only one local catalog.

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- Category browsing occurs in the local catalog only.
- A store that contains a transparent punchout catalog does not allow Advanced Search. Advanced Search is performed on the local catalog only.
- If a store contains only punchout catalogs, set at least one of the punchout catalogs to always display in the search results, to prevent the **Search Results Summary** page from being blank when the search returns no matching items. See the online Help in the eContent Manage for instructions on managing stores.

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**Note:** A store that contains only a punchout catalog or only an informational catalog goes directly to that catalog when you click the store's link on the **Shop** home page.

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- The default Main Store has no image associated with it. If you want to associate images with stores, see the online Help about stores in the eContent Manager. See also [Managing Images](#) on page 3-50.

## 3.2 Creating and Maintaining Local Content

Populating the local catalog with content consists of the following activities. Either extracting or bulk loading data is required; everything else is optional:

- [Extracting Catalog Data from Oracle Applications](#) on page 3-16
- [Bulk Loading Catalog Data](#) on page 3-30
- [Define Category Mapping](#) on page 3-34
- [Define Classification and Supplier Domains](#) on page 3-39

Perform the following steps to set up a local catalog:

1. Determine the source of data for the local catalog—the extractor, which pulls data from Oracle Applications; the bulk loader, which loads the data in files; or both.
2. Analyze your catalog structure. What categories and subcategories do you use? What descriptors, such as manufacturer or ink color, do you use to describe items?
3. Create categories by using the extractor, which pulls categories from Oracle Applications; the online or bulk load schema editor in Oracle iProcurement; or both.
  - See [Extracting Catalog Data from Oracle Applications](#) on page 3-16 for instructions on using the extractor.
  - See [Appendix C](#) for instructions on schema bulk loading. See the eContent Manager online Help for instructions on schema online editing.
  - You can also include new categories and descriptors when bulk loading catalog items in step 5, if the POR:Load Auto profile options are set to Yes.

4. Once you have extracted or bulk loaded categories, log on using the iProcurement Catalog Administration responsibility and access the eContent Manager.

Using the online Help in the eContent Manager, complete the following steps:

- If you created new categories using the bulk loader, you must use the **Map Catalog Categories** page in the eContent Manager to map your categories to categories set up in Oracle Applications. (Alternatively, you can leverage mapping in Oracle e-Commerce Gateway while bulk loading items in step 5. See [Define Category Mapping](#) on page 3-34.) All categories must map to Oracle Applications categories before requesters can successfully create requisitions.
  - Optionally use the **Map Oracle Categories** page in the eContent Manager to "rename" Oracle Applications categories as they are displayed in Oracle iProcurement.
  - Optionally use the table of contents in the eContent Manager or the schema bulk loader to create a hierarchy of categories that requesters can browse when looking for items. (Requesters can still search for items without browsing, if you do not create a hierarchy of categories.)
5. Add catalog items to the local catalog using the extractor, bulk loader, or both.
    - See [Extracting Catalog Data from Oracle Applications](#) on page 3-16.
    - See [Bulk Loading Catalog Data](#) on page 3-30.
  6. If bulk loading data, see if you need to perform the following steps:
    - [Define Category Mapping](#) on page 3-34.
    - [Define Classification and Supplier Domains](#) on page 3-39.
  7. If you want to include images with items, see [Managing Images](#) on page 3-50.
  8. Optionally segment your local catalog by supplier, by creating additional local catalogs, if needed. Be sure your local catalog belongs to a store.

See the online Help in the eContent Manager for instructions on managing catalogs and stores.
  9. If you want to control access to certain categories in the local catalog, see [Defining Realms](#) on page 3-64.

## 3.2.1 Extracting Catalog Data from Oracle Applications

The following purchasing data from Oracle Purchasing can be reflected in the Oracle iProcurement catalog:

- Purchasing categories
- Blanket purchase agreements
- Global agreements
- Catalog quotations
- Requisition templates
- Approved supplier list (ASL) entries
- Items from the item master file, including internally orderable items

For more information on creating these sources of purchasing data, see the *Oracle Purchasing User's Guide*.

### Setup Steps

The catalog extractor in Oracle Purchasing is used to populate the Oracle iProcurement catalog with your Oracle Purchasing data. To extract this purchasing data, perform the following setup.

#### 3.2.1.1 Select Extractor Options

1. Set or review the profile options listed in [Profile Options](#) on page 3-25.
2. Select Extractor Options (Required)

Before running the catalog extractor, you must specify which data elements you wish to make available in Oracle iProcurement. For example, if your company does not use requisition templates, there is no need to extract them.

To specify data elements for extraction:

- a. Open the Define Catalog Server Loader Values window using the following navigation path after logging into Oracle Purchasing: Setup > E-Catalog Admin > Loader Values.

**Figure 3–5 Define Catalog Loader Values Window**

The screenshot shows a window titled "Define Catalog Server Loader Values (Vision Operations)". It contains two main sections: "Classification Data" and "Item Data".

**Classification Data Section:**

	Extract	Last Run Date
Categories	<input checked="" type="checkbox"/>	2003/06/17 04:36:59
Template Headers	<input checked="" type="checkbox"/>	2003/06/17 04:36:59

Log Level: 2  
Commit Size: 2500

Button: Extract Classifications

**Item Data Section:**

	Extract	Last Run Date
Contracts	<input checked="" type="checkbox"/>	2003/06/17 04:39:38
Item Master	<input checked="" type="checkbox"/>	2003/06/17 04:39:38
Template Lines	<input type="checkbox"/>	2003/04/25 15:34:33
Internal Items	<input type="checkbox"/>	2003/03/06 14:16:41

Log Level: 2  
Commit Size: 2500

Button: Extract Items

- b. For the Extract Classifications program (Classification Data section), indicate whether to extract purchasing categories and requisition template headers to Oracle iProcurement by selecting the corresponding checkbox. (Requisition templates become public lists in Oracle iProcurement. These are public shopping lists of items available to all requesters in an operating unit.)

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**Notes:**

- Categories must be selected to extract any data in the Extract Items program (Item Data section).
  - Template Headers must be selected to extract Template Lines in the Extract Items program.
- 
- 

- c. The Last Run Dates for both categories and template headers are automatically populated at the conclusion of each Extract Classifications program. This value is used by the catalog extractor to determine the data that has changed between the date and time stamp captured on this

window (the last time the program ran) and the date and time of the current extractor run. Normally, there is no need to alter these values. Clearing out the date and time stamp is equivalent to running the catalog extractor for the first time. The longer span of time between the Last Run Date and now (or when running it for the first time), the more data the extractor has to process and the longer it may take to extract the data.

- d. Enter a Log Level to determine the level of detail that should be stored in the log file. The following values are supported:

**Table 3-3 Log Level Settings**

Value	Data Captured in Log File
-1	No log file created
1	Fatal errors
2	Fatal errors and data errors
3	Fatal errors, data errors, and item level details
4	Fatal errors, data errors, item level details, and sub-table level information

The recommended value is 2. If, however, items you expected to be extracted were not extracted, run the extractor again for these items, specifying an earlier Last Run Date and time (to be sure you extract the same contents as last time) and setting the Log Level to 3 or 4. At these levels, the log explains why certain items were not extracted.

- e. Enter a Commit Size to determine the number of records that are processed before committing the data. This number defaults from the POR: Bulk Loader / Extractor Commit Size profile option and should depend upon your volume and database configuration.
- f. For the Extract Items program (Item Data section), indicate whether to extract your item master file, requisition template lines, or internal items to Oracle iProcurement by selecting the corresponding checkbox.

---



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**Notes:**

- Both Template Headers and Template Lines must be selected to extract requisition templates.
  - Categories must be selected to extract any data in the Extract Items program.
- 
-

By default, blanket purchase agreements (including global agreements) and quotations are extracted. These are grouped together in the Contracts option.

Selecting Item Master extracts purchaseable items in the master item file and item-level ASL entries. Selecting Internal Items extracts internally orderable items, which can be placed on internal requisitions, if the internal requisitions functionality has been implemented in Oracle Purchasing.

If an item is both purchaseable and internally orderable, it is extracted based on your selection. If you select only Item Master, it is extracted as a strictly purchaseable (external) item. If you select only Internal Items, it is extracted as a strictly internal item. If you select both, it is available as both an internal and external item in the catalog (if POR: Legal Requisition Type is set to BOTH).

- g. The Last Run Dates for Contracts, Item Master, Template Lines, and Internal Items behave in the same manner as described in step c.
- h. Populate values for the Log Level and Commit Size as described in steps d and e above.

### 3. Define Rollback Segment (Optional)

Use the Concurrent Programs window to define rollback segments for each of the extractor programs:

- Catalog Data Extract - Classifications
- Catalog Data Extract - Items
- Catalog Data Extract - Purge

Rollback segments are used by the database to store the information needed to undo changes when necessary (for example, during a system failure). Defining rollback segments is optional, because the default rollback settings should be adequate. If you choose to define rollback segments, however, get help from your database administrator. Defining rollback segment sizes can affect the successful completion and performance of the extractor.

For more information on managing concurrent programs, see the *Oracle Application System Administrator's Guide*.

### 4. Extract the Data (Required)

Extract the data in one of two ways:

- Click the Extract buttons in the Define Catalog Server Loader Values window. See [Launching the Catalog Extractor from the Loader Values Window](#) on page 3-22.
- Use the Submit Requests window. See [Launching the Catalog Extractor from the Submit Request Window](#) on page 3-22.

### 3.2.1.2 Managing the Catalog Extractor

To transfer your purchasing data into the Oracle iProcurement catalog, the catalog extractor must be launched. The catalog extractor consists of four concurrent programs:

#### 1. Catalog Data Extract - Classifications

Based on your selections in the Define Catalog Server Loader Values window, this program transfers eligible Oracle Purchasing categories and requisition template headers to the Oracle iProcurement catalog. This program also synchronizes category name changes made in Oracle Purchasing with catalog data in Oracle iProcurement. It also purges inactive categories and requisition template headers. This program concludes with a rebuild of the interMedia index that ensures the data in the Oracle iProcurement catalog correctly reflects the data in your Oracle Purchasing system.

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**Note:** Detailed information on the eligibility requirements of categories and template headers can be found in [Extractor Requirements for Purchasing Data](#) on page 3-26.

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#### 2. Catalog Data Extract - Items

This program makes your eligible Oracle Purchasing data available to Oracle iProcurement requesters. The specific purchasing data that is extracted depends on your selections in the Define Catalog Server Loader Values window and can include blanket purchase agreements, global agreements, catalog quotations, master items, internal items, approved supplier lists, and requisition template lines. This program also purges invalid items and documents. Examples include blanket purchase agreements that have expired or items that are no longer purchaseable. This program also rebuilds the interMedia index to ensure the data in the Oracle iProcurement catalog correctly reflects the data in Oracle Purchasing.

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**Note:** Detailed information on the eligibility requirements of Oracle Purchasing data can be found in [Extractor Requirements for Purchasing Data](#) on page 3-26.

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### 3. Catalog Data Extract - Purge

The purge program deletes from the Oracle iProcurement catalog data that has been explicitly deleted in Oracle Applications. (Data that becomes inactive or invalid is deleted when running the classification and item extractor programs.) Data that you can delete explicitly are master items, requisition template lines, and quotation lines. These items are purged from both the catalog and requesters' favorites lists when you run the purge program.

### 4. Rebuild Catalog Item interMedia Index

Rebuilding the index ensures that data in the Oracle iProcurement catalog is consistent with data in Oracle Purchasing. This program indexes the Oracle Purchasing data in Oracle iProcurement so that it can be searched. The indexing works somewhat like a book index, to help find things faster. This program is included in both the extract classifications and extract items programs, but is offered as a separate program for use on an exception basis only (for example, when data corruption occurs).

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**Note:** Other than for exceptions, you should not run this program independently. For example, if you are upgrading Oracle iProcurement or extracting data and the log indicates a database error occurred while the interMedia Index was running, you could run the interMedia Index program independently; however, you should always investigate the error before running the program, to make troubleshooting the problem easier.

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The catalog extractor can be launched from either the Define Catalog Loader Values window or the Submit Request window. The recommended order for running the catalog extractor is:

1. Catalog Data Extract - Classifications
2. Catalog Data Extract - Items
3. Catalog Data Extract - Purge (Optional)

4. Rebuild the Catalog Item interMedia Index (Only if data corruption or some other exception occurs)

For more information on creating a report set to run the Extract and Purge programs in the recommended order or to schedule them to run at a specified time, see the *Oracle Application System Administrator's Guide for Release 11i*.

### 3.2.1.3 Launching the Catalog Extractor from the Loader Values Window

To launch the catalog extractor from the Define Catalog Server Loader Values window:

1. Follow the instructions in [Setup Steps](#) on page 3-16 to select the data you want to extract and other extractor options.
2. Click Extract Classifications.
3. Monitor the extraction request in Oracle Purchasing by choosing Requests. Choose View Log to check for errors. See [Viewing the Log File](#) on page 3-24.
4. Once the classifications request completes successfully, return to the Define Catalog Server Loader Values window and click Extract Items.
5. Monitor the extraction request in Oracle Purchasing by choosing Requests. Choose View Log to check for errors. See [Viewing the Log File](#) on page 3-24.

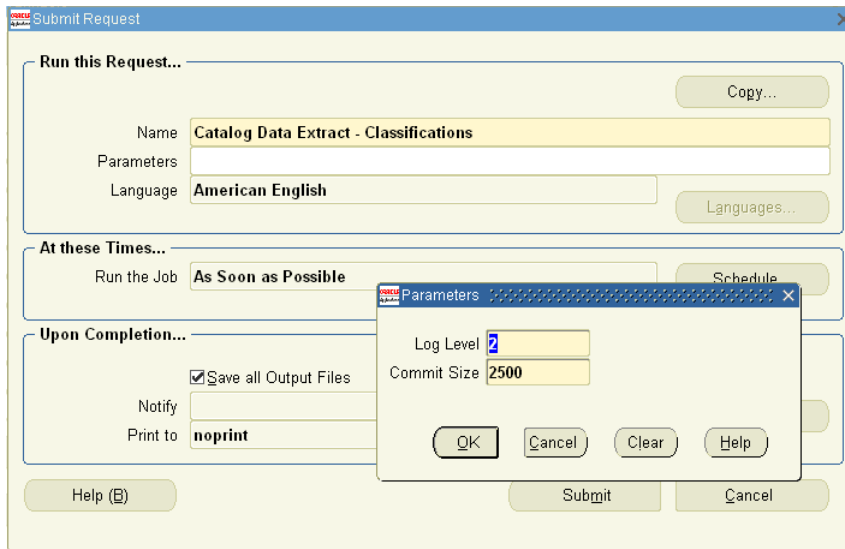
### 3.2.1.4 Launching the Catalog Extractor from the Submit Request Window

Instead of launching the catalog extractor from the Define Catalog Server Loader Values window, you can launch the extractor from the Submit Request window. The Submit Request window runs the extractor with the options you selected in the Define Catalog Loader Server Values window.

#### Extract Classifications and Items

To extract classifications and items:

1. Open the Submit Request window using the following navigation path after logging into Oracle Purchasing: Requests > Submit a New Request > Single Request
2. Select Catalog Data Extract - Classifications as the Report Name.

**Figure 3–6 Submit Request Window**

3. Enter values for the following parameters:
  - Log Level. The recommended value is 2. See [Table 3–3](#) for more information on the Log Level field.
  - Commit Size. See [Select Extractor Options](#) on page 3-16 for more information on the Commit Size field.
4. Choose OK to return to the Submit Request window.
5. Choose Submit to execute the program.
6. Once the request has completed successfully, choose: Submit a New Request > Single Request
7. From the Submit Request window select Catalog Extract Data - Items in the Name field and follow the same steps as above for submitting the classifications program.

### **Purge Data (Optional)**

To purge data:

1. Once the classifications and item requests have completed processing, choose Submit a New Request > Single Request to return to the Submit Request window.

2. Select Catalog Extract Data - Purge in the Name field.
3. Enter values for the Log Level and Commit Size using the guidelines specified in [Select Extractor Options](#) on page 3-16.
4. Choose OK to return to the Submit Request window.
5. Choose Submit Request to execute the program.

#### **Rebuild interMedia Index (Optional)**

To rebuild the Item interMedia Index only if problems, such as data corruption, occur:

1. Once the classifications and item requests (and the purge request, if performed) have completed processing, choose: Submit a New Request > Single Request
2. In the Submit Request window, select Rebuild Catalog Item interMedia Index in the Name field.
3. Choose OK to return to the Submit Request window.
4. Choose Submit Request to execute the program.

#### **Monitor the Requests (Recommended)**

To monitor the requests:

1. In Oracle Purchasing, choose Requests.
2. Use the Find Requests window to monitor the status of the requests.
3. Choose View Log to check for errors. See [Viewing the Log File](#) on page 3-24.

#### **3.2.1.5 Viewing the Log File**

Use the Requests window to access the log files for each program of the catalog extractor. Select the corresponding Request ID of the program whose log file you want to review and click View Log to open the file.

Figure 3-7 Monitoring Requests

Request ID	Name	Parent	Phase	Status	Parameters
1730826	Catalog Data Purge		Pending	Standby	2, 2500
1730823	Catalog Data Extract - Ite		Running	Normal	2, 2500
1730812	Catalog Data Extract - Cl		Completed	Normal	2, 2500
1721551	Catalog Bulk Load - Item		Completed	Normal	ap503cmr.us.oracle.com, /nfs/grou
1718278	Receiving Transaction Pi		Completed	Normal	IMMEDIATE, 11435
1718275	Receipt Traveller Concur		Completed	Normal	P_group_id=11434, P_receipt_sou
1718274	Receiving Transaction Pi		Completed	Normal	IMMEDIATE, 11434
1718272	Receipt Traveller Concur		Completed	Normal	P_group_id=11433, P_receipt_sou
1718271	Receiving Transaction Pi		Completed	Normal	IMMEDIATE, 11433
1718270	ADS (Pay On Receipt Au		Completed	Normal	ERS, 1, 9968, 0

If you chose a Log Level of at least 3 when running the programs, the View Log window provides clear explanations for any item or classification that was not extracted. (If an item or classification does not meet the requirements described in [Extractor Requirements for Purchasing Data](#) on page 3-26, it does not get extracted.)

For items, the log informs you of failed extractions only if the item and all associated documents are not extracted. For example, if an item exists on an inactive blanket purchase agreement, but its master item record is extracted, no message is shown for the item's blanket purchase agreement record failing extraction.

Only the person who performed the extraction can view the log.

### Profile Options

The following profile options affect the extractor:

- **POR: Bulk Loader/Extractor Commit Size** sets the number of records that are processed at a time. By default, it is set to 2500; however, you can change this default depending on the volume of purchasing data you expect to extract and your database configuration. See [Profile Options](#) on page 2-8.

- POR: Extract BPA/Quote Images, when set to Yes, extracts images along with blanket purchase agreement or catalog quotation items if they are associated with image files or image URLs. (By default this profile option is set to Yes.) See [Managing Images](#) on page 3-50.

### **AK Regions/Attributes**

Not applicable

### **Function Security**

None

### **Workflow**

None

### **Implementation Considerations**

The following sections describe extractor requirements and other considerations.

#### **3.2.1.6 Extractor Requirements for Purchasing Data**

The extraction criteria for each of the following data elements is explained in further detail below:

- Purchasing categories
- Blanket purchase agreements
- Global agreements (blanket purchase agreements for which Global is selected)
- Catalog quotations
- Requisition templates
- Approved supplier list (ASL) entries
- Items from the item master file, including internally orderable items

The extractor does not extract outside processing items.

If the extracted items include updates to items that requesters have placed on favorites lists, the favorites lists are also updated. (Saved carts are not updated, but upon checkout, Oracle iProcurement will alert the requester to items that no longer exist or are no longer valid.)

The item data that is extracted is as follows: supplier, supplier site, category, item number, item description, unit of measure (UOM), price, currency, supplier item

number, attribute 13 (for images, if any, on blanket purchase agreements or catalog quotations), and attribute 14 (for image URLs, if any, on blanket purchase agreements or catalog quotations). If extracting requisition templates, the requisition template name is also extracted and displayed as a public shopping list. If extracting items from agreements or quotations, the agreement or quotation number is also extracted; the number displays to the requester if it is set up to display using schema editing.

See also [Items Displayed in Search Results](#) on page D-9.

**Purchasing Categories** For categories to be extracted into the Oracle iProcurement catalog, the following requirements must be satisfied:

- The category belongs to the Purchasing Category set.
- The category is Enabled for iProcurement in the Categories window. (See the *Oracle Inventory User's Guide*, or the online Help for the Categories window.)
- The category is active.

Oracle iProcurement extracts the category description, such as Computers and Monitors, and displays that as the category name in Oracle iProcurement. If there is no category description, it extracts the category code, such as IT.COMPUTER, and makes that the category name.

**Blanket Purchase Agreements** Items on blanket purchase agreements appear in the Oracle iProcurement catalog if the following conditions are met:

- The blanket purchase agreement is approved and valid (not canceled, closed, finally closed, or frozen).
- The blanket purchase agreement header and line are active. (Their effective dates include today.)
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.

**Global Agreements** Items on global agreements appear in the Oracle iProcurement catalog if the following conditions are met:

- The global agreement meets the same requirements as given for blanket purchase agreements, above.
- Since global agreements are created in one operating unit and assigned to others, the following conditions must also be met to ensure that the global agreement is valid in its assigned operating units:

- The supplier site for the item on the global agreement is an active Purchasing site in the assigned operating unit.
- If the item on the global agreement is a master item, the item is defined in the financial system parameters (FSP) organization for the assigned operating unit and is purchaseable in the FSP organization.

The FSP organization is the inventory organization specified in the Supplier-Purchasing tabbed region of the Financial Options window. Each operating unit has an FSP organization that contains a bank of valid items for that operating unit. If an item on a global agreement exists in the FSP organization in the operating unit in which the agreement was created but not in the assigned operating unit, then the item is not extracted from the assigned operating unit.

- If the item on the global agreement is a master item, the UOM class used on the agreement must match the UOM class defined for the master item.

If the currency on the global agreement differs from the requester's functional currency, the rate type from the Purchasing Options (for the requester's operating unit) and the extraction date are used to perform the currency conversion.

**Catalog Quotations** Items on quotations appear in the Oracle iProcurement catalog if the following conditions are met:

- The quotation is of type Catalog. No bid quotations are extracted.
- The quotation is active.
- If the quotation requires approval (Approval Required is selected), the item must have at least one price break, the price break must have effective dates that include today (price breaks dated in the future are not included), and the price break must be approved for All Orders or Requisitions.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.

**Requisition Templates (Public Lists)** Items on requisition templates appear in the Oracle iProcurement catalog if the following conditions are met:

- The template is active.
- The item was not copied from a blanket purchase agreement header or line that is unapproved, canceled, closed, finally closed, or frozen, or whose effective dates do not include today.

- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.
- The template header has been extracted.
- The item does not already exist on an extracted blanket purchase agreement, global agreement enabled in the item's operating unit, or quotation.

In addition to requisition template items appearing in the catalog, matching requisition template names (for both purchaseable and internal type templates) also appear as shopping lists (also known as public lists) in the Related Links box on the **Search Results** page.

The same item that exists on multiple requisition templates displays as just one item in the search results; however, requesters can access all requisition templates for the item by clicking the shopping lists related link on the **Search Results** page.

**Approved Supplier Lists (ASL)** Items associated with ASLs appear in the Oracle iProcurement catalog if the following conditions are met:

- The ASL entry is item based, not commodity based.
- The ASL entry is not disabled.
- The supplier is enabled and allowed to source the item. (The supplier is assigned a status in the ASL entry that enables it to source the item.)
- The item has a list price associated with it in the Master Item window.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.
- The item does not already exist on an extracted requisition template, blanket purchase agreement, global agreement enabled in the item's operating unit, or quotation.

**Purchaseable Master Items** Purchaseable items from the master item file (defined in the Master Item window) appear in the Oracle iProcurement catalog if the following conditions are met:

- The item is a purchasable item.
- The item is not a configurable item.
- The item has a list price associated with it.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.

- The item does not already exist on an extracted ASL, requisition template, blanket purchase agreement, global agreement enabled in the item's operating unit, or quotation.

**Internal Master Items** Internally orderable items from the master item file appear in the Oracle iProcurement catalog if the following conditions are met:

- The item is internal orders enabled.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.
- The item does not already exist on an extracted ASL, requisition template, blanket purchase agreement, global agreement enabled in the item's operating unit, or quotation.

If the internal requisitions functionality in Oracle Purchasing is set up, the extracted internal items can be placed on internal requisitions. See [Select Extractor Options](#) on page 3-16. See also the *Oracle Purchasing User's Guide*.

### 3.2.1.7 Translating Purchasing Data

Translations provided for both categories and items in the master item file are reflected in the Oracle iProcurement catalog. When creating categories and master items in Oracle Purchasing, use the translation icon to provide descriptions for the languages installed in your environment. When you extract categories and master items, requesters can see the translated values based on their catalog language preference while searching the Oracle iProcurement catalog.

For more information on translating data in Oracle Applications, please refer to the *Oracle Applications User's Guide for Release 11i*.

### 3.2.1.8 Bulk Loading Updates to Extracted Items

For information on what happens when you use bulk loading to update extracted items, see the appendices on loading catalog data later in this guide.

## 3.2.2 Bulk Loading Catalog Data

The Oracle iProcurement catalog supports the bulk loading of catalog data. Catalog data consists of the items and services available for purchase as well as the associated prices for these goods.

Catalog data may have originated from any of the following sources:

- Downloaded from an Oracle Exchange marketplace, such as Exchange.Oracle.com.
- Obtained directly from a supplier.
- Obtained from a third-party catalog provider.
- Created internally.

The bulk loader supports item catalogs created in the following formats:

- Tab-delimited text file (spreadsheet)
- XML
- Catalog Interchange Format (CIF)
- cXML (commerce eXtensible Markup Language, which is based on the XML language)

The catalog bulk loader also supports the creation of catalog schema using XML files. The catalog schema consists of a combination of categories, local descriptors used to describe items in a specific category, and base descriptors used to describe any item or service in the catalog.

### Setup Steps

To use the catalog bulk loader to populate the Oracle iProcurement catalog, the following setup steps must be performed:

1. To ensure that you can download bulk load resources (such as the bulk load Readme files) in the eContent Manager, verify Parameters in the `ssp_init.txt` file:

Ensure the following line is present in the `[iAS ORACLE_HOME]/Apache/Jserv/etc/ssp_init.txt` file and is set accordingly:

```
icxCatalogTemplateRoot=<OA_HTML>/US/
```

If this setting is incorrect, the resource Zip files will contain no data.

2. Set or review the profile options listed in [Profile Options](#) on page 3-33.
3. If you will be bulk loading cXML files, download the latest cXML DTD from <http://www.cxml.org/> and copy it to the `$ICX_TOP/xml/orc115` directory.  
The Document Type Definitions (DTDs) for the item and schema XML files are automatically copied to the `$ICX_TOP/xml/orc115` directory. Perform this step for cXML loading only.
4. Optionally set up category mapping in Oracle e-Commerce Gateway.

See [Define Category Mapping](#) on page 3-34 for details.

5. If you will be bulk loading CIF or cXML files, optionally define classification and supplier domains.

See [Define Classification and Supplier Domains](#) on page 3-39 for details.

6. Optionally define rollback segments.

Use the Concurrent Programs window to define rollback segments for each of the bulk loader programs:

- Catalog Bulk Load - Items & Price Lists
- Catalog Bulk Load - Catalog Structure

Rollback segments are used by the database to store the information needed to undo changes when necessary (for example, during a system failure). Defining rollback segments is optional, because the default rollback settings should be adequate. If you choose to define rollback segments, however, get help from your database administrator. Defining rollback segment sizes can affect the successful completion and performance of the extractor.

For more information on managing concurrent programs, see the *Oracle Application System Administrator's Guide*.

### 3.2.2.1 Bulk Loading Instructions

For instructions on bulk loading tab-delimited text or XML files, including schema files, see the bulk loading appendices.

For information on bulk loading cXML or Catalog Interchange Format (CIF) files, see the online Help in the eContent Manager.

### 3.2.2.2 Managing the Bulk Loader

The bulk loader is controlled by the concurrent manager, the program that operates the Submit Request window for submitting and viewing requests. If the concurrent manager is running, the bulk loader is running.

You can monitor bulk load jobs using either the eContent Manager (where bulk loads are submitted) or the Requests window in Oracle Applications (shown in [Figure 3-7](#)). If you have trouble diagnosing an error in a bulk load, you may get more details using the View Log button in the Requests window. (After the bulk loader completes, it automatically runs the interMedia Index, the status of which displays in the log.)

For instructions on monitoring bulk load jobs through either the **View Bulk Load Status** page in the eContent Manager or the Requests window, see the Loading Your File sections in the bulk loading appendices later in this guide.

### **Profile Options**

Set or review the following profile options if you use bulk loading; see [Profile Options](#) on page 2-8 for descriptions:

- FND: NATIVE CLIENT ENCODING
- ICX: Client IANA Encoding
- POR: Apply Category Mapping
- POR: Approved Pricing Only
- POR: Bulk Load for All Business Groups
- POR: Bulk Loader/Extractor Commit Size
- POR: Catalog Bulk Load Directory
- POR: Default Currency Conversion Rate Type
- POR: Hosted Images Directory
- POR: Load Auto Attrib
- POR: Load Auto Category
- POR: Load Auto Root
- POR: Purge Jobs Older Than (days)
- POR: Set Debug Catalog Loader ON

### **AK Regions/Attributes**

Not applicable

### **Function Security**

The POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which files are bulk loaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

### **Workflow**

None

## Implementation Considerations

No additional considerations.

### 3.2.3 Define Category Mapping

You can use category mapping in Oracle e-Commerce Gateway for local, punchout, and transparent punchout catalogs. For instructions on setting up category mapping for punchout or transparent punchout catalogs, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*. For local catalogs, use the instructions below.

When bulk loading to the local catalog, you have the option to apply category mapping to the file. For example, the external category File Folders is mapped in Oracle e-Commerce Gateway to the Oracle Applications category OFFICE.SUPPLIES. Using the **Bulk Load Items & Price Lists** page in the eContent Manager, you bulk load a file that specifies the category File Folders for an item. You choose to apply category mapping during the bulk load as shown in [Figure 3-8](#). In this example, the bulk loader maps the category File Folders to the category OFFICE.SUPPLIES in Oracle Applications. The item is bulk loaded to OFFICE.SUPPLIES.

The apply category mapping feature performs the same mapping that the **Map Catalog Categories** page does in the eContent Manager, except that it does the mapping during bulk loading. (**Map Catalog Categories** does its mapping when the requester adds the items to the cart.) Typically, you would use one method or the other to do mapping.

**Figure 3–8 Category Mapping Option on the Bulk Load Items & Price Lists Page**

**Manage Catalogs and Stores**  
[Manage Catalogs](#)  
[Manage Stores](#)

**Download from Exchange**  
[Download Supplier Punchout Definition](#)

**Manage Items and Price Lists**  
[Download Resources](#)  
[Bulk Load Items & Price Lists](#)  
[View Bulk Load Status](#)  
[Mass Delete](#)

**Manage Schema**  
[Bulk Load Schema](#)  
[Edit Schema](#)  
[Build Table of Contents](#)  
[Map Oracle Categories](#)  
[Map Catalog Categories](#)

### Bulk Load Items & Price Lists

Use this page to bulk load your file. Press the Specify Options button to select additional bulk load options if desired. When you are ready to load your file, press the Start Load Now button.

---

#### Choose a File

\* Indicates required field

\* File Name

\* File Type

- Tab-delimited text
- XML
- Catalog Interchange Format (CIF)
- cXML

---

#### Apply Category Mapping

Do you want to map the categories in this file to Oracle categories? [Learn more...](#)

- Yes
- No, use the values from the file

You do not have to apply the Oracle e-Commerce Gateway category mapping during bulk loading. (You can choose No on the **Bulk Load Items & Price Lists** page. For example, you may want to use the mapping for punchout catalogs or some other purpose only.)

For more mapping examples, see the online Help on bulk loading in the eContent Manager.

### Setup Steps

To set up category mapping for local catalogs:

1. For each category in Oracle Applications to which you will be mapping external categories, make sure Enabled for iProcurement is selected in the Categories window and the category is extracted. Otherwise, the mapping will fail. See [Extracting Catalog Data from Oracle Applications](#) on page 3-16.
2. Set or review the profile options listed in [Profile Options](#) on page 3-37.

3. In Oracle Applications, access the eCommerce Gateway application and use the following navigation to open the Code Conversion Values window: Setup > Code Conversion > Define Code Conversion Values.

The code conversions you define here apply to all operating units.

**Figure 3–9 Code Conversion Values Window**

Category	Description	Direction	Key 1	Key 2	Internal Value	External 1	Key 3
ITEM_CATEGO		IN	A Supplier		OFFICE.SUPP	File Folders	
ITEM_CATEGO		IN			MISC.MISC	Promotional	
ITEM_CATEGO		IN	B Supplier		OFFICE.SUPP	Folders	

4. In the Category field, select ITEM\_CATEGORY.
5. Enter your own Description for the mapping, if desired.  
A Description can help you determine what the mapping is for, if you need to edit it in the future.
6. For the Direction, enter IN.
7. For Key 1, enter a supplier name if the mapping applies only to a specific supplier, or leave this field blank to apply the mapping to all suppliers.  
If the mapping applies to a specific supplier, enter the supplier name exactly as it was defined in Oracle Applications, including using the same case. Otherwise, the mapping specific to this supplier will fail when you bulk load.
8. Key 2 through Key 5 are not used.
9. For the Internal Value, enter the category code that Oracle Applications uses.  
Enter the category code exactly as defined in Oracle Applications, such as MISC.MISC. Otherwise, the mapping will fail when you bulk load.

10. For the External 1 value, enter the category code that the supplier in the bulk load file uses.

A bulk load file can use either the category name (such as File Folders) or category key (such as UNSPSC\_44.12.20.11) to specify the category. You can enter either the name or key in the External 1 field.

11. The fields External 2 through External 5 are not used.
12. If you want to map more than one external code to a single internal code, create a new row for each mapping.

You cannot map a single external category code to more than one internal category code, unless you are doing so for different suppliers.

Mapping occurs on categories that are mapped in Oracle e-Commerce Gateway when the bulk load occurs.

### **Profile Options**

- POR: Apply Category Mapping. Setting this profile to Yes defaults the Apply Category Mapping option on the **Bulk Load Items & Price Lists** page to Yes. Setting it to No defaults the Apply Category Mapping option to No.
- POR: Load Auto Category. If this profile is set to Yes *and* if the mapping was not successful, then Oracle iProcurement creates the category during the bulk load.

### **AK Regions/Attributes**

Not applicable

### **Function Security**

The POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which files are bulk loaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

### **Workflow**

None

### **Implementation Considerations**

Decide whether to create supplier-specific category mapping, or mapping that applies to all suppliers.

If the Apply Category Mapping option was selected on the **Bulk Load Items & Price Lists** page, the bulk loader performs the following steps depending on whether you have set up supplier-specific mapping:

1. The bulk loader checks whether supplier-specific mapping exists in Oracle e-Commerce Gateway for the category in the bulk load file:
  - Is there a match between the Supplier specified in the bulk load file and the supplier specified in the Key 1 field? This check is case sensitive because supplier names are case sensitive in Oracle Applications.
  - Is there a match between the category specified in the bulk load file and the category specified in the External Value 1 field, for that supplier?

---



---

**Note:** The mapping works on extracted categories only. If the internal mapped category (OFFICE.SUPPLIES in the earlier example) has not been extracted, the mapping fails. Recall that only iProcurement-enabled categories get extracted.

---



---

2. If supplier-specific mapping does not exist, the bulk loader looks for the same category mapping where Key 1 is blank (no supplier is specified).
3. If mapping exists, the bulk loader applies the conversion.

The bulk loader performs the mapping on the category name specified in the file; however, if you also specified a category key in the bulk load file, Oracle iProcurement tries to map the key if it couldn't map the name.

The bulk loader chooses supplier-specific mapping over non-supplier-specific mapping, if both exist. The following table shows an example:

Category	Direction	Key 1	Internal Value	External Value 1
ITEM_CATEGORY	IN	Supplier A	MISC.MISC	Software
ITEM_CATEGORY	IN		COMP.SFTW	Software
ITEM_CATEGORY	IN		COMP.HDW	Hardware

In this example:

- A catalog file for Supplier A specifies the category Software. The bulk loader maps Software to MISC.MISC.

- A catalog file for Supplier B specifies the category Software. The bulk loader maps Software to COMP.SFTW.
- A catalog file for Supplier A specifies the category Hardware. The bulk loader maps Hardware to COMP.HDW.

If there is a problem with the supplier-specific mapping—for example, the category in the Internal Value field does not exist in Oracle Applications (it was entered wrong)—the bulk loader does not use the non-supplier-specific mapping, but rejects the item, if POR: Load Auto Category is set to No. This way, an error message informs you there is a problem with the mapping, and you can correct it. (If POR: Load Auto Category is set to Yes, then the item is loaded to the category specified in the bulk load file.)

Since the bulk loader looks only at the Key 1, Internal Value, and External Value fields to determine the mapping, it might find mappings that are the same. For example, if you set up two ITEM\_CATEGORY mapping rows for use with another application, identical except for their Key 2 fields, the bulk loader considers these identical. If the bulk loader finds multiple, identical mappings, it rejects the item if POR: Load Auto Category is set No.

4. If you have also set up category mapping on the **Map Oracle Categories** page in the eContent Manager, that mapping is additionally taken into account.

For example, File Folders in the bulk load file is mapped to OFFICE.SUPPLIES in Oracle Applications. OFFICE.SUPPLIES is mapped to Office Supplies/Furnishings on the **Map Oracle Categories** page. The bulk loader maps File Folders to OFFICE.SUPPLIES, but the requester sees the item in Office Supplies/Furnishings.

See the online Help on bulk loading in the eContent Manager for more mapping examples.

### 3.2.4 Define Classification and Supplier Domains

If you will be loading CIF or cXML files, you can optionally define classification and supplier domains.

When bulk loading CIF or cXML files, the **Specify Options** page enables you to select a single classification or supplier domain to use for the entire file. See [Figure 3-10](#). (Multiple supplier domains are used by cXML only.)

- Classification domains are used to identify the system by which categories are known. For example, the United Nations Standard Product and Service Code (UNSPSC) is a classification domain.

- Supplier domains are used to identify the system by which suppliers are known. For example, a Dun and Bradstreet DUNS number is a supplier domain.

CIF and cXML files can contain multiple domains to identify a category or supplier for an item. A supplier may include multiple domains in a file so that the file can be used by multiple buyers. For example, some buyers use UNSPSC codes; others may use another classification code. In this case, the supplier creates a single file, but specifies two classification domains. Each buying company chooses the classification domain its company uses.

Although the file may contain multiple domains, the bulk loader can process only one domain at a time. The domain you select or enter on the **Specify Options** page must match a domain in the file. The bulk loader then uses the domain for the entire file. For example, if you specify the UNSPSC domain that the supplier uses in the file, the category name that is loaded with the item is the UNSPSC category. If that is not the name that Oracle iProcurement uses for the category, specify another domain in the file that uses the naming you use.

To specify a domain while bulk loading (see [Figure 3-10](#)), you have two options:

- Manually enter a domain that is identical to a domain specified in the file.
- Use the flashlight icon to select a domain that is identical to a domain specified in the file. This method lists domains defined as lookups in Oracle Applications.

**Figure 3–10 Specifying Domains While Bulk Loading CIF or cXML Files**

**Manage Catalogs and Stores**  
[Manage Catalogs](#)  
[Manage Stores](#)

**Download from Exchange**  
[Download Supplier Punchout Definition](#)

**Manage Items and Price Lists**  
[Download Resources](#)  
[Bulk Load Items & Price Lists](#)  
[View Bulk Load Status](#)  
[Mass Delete](#)

**Manage Schema**  
[Bulk Load Schema](#)  
[Edit Schema](#)  
[Build Table of Contents](#)  
[Map Oracle Categories](#)  
[Map Catalog Categories](#)

### Specify Options for File: Appendix 4.3\_contract.xml

Enter additional information for the file. Cancel Start Load Now

#### Classification Domain

Select a single domain to use for the file. [Learn more...](#)

Classification Domain

Lines will be rejected if they contain multiple domains and you do not select a domain here.

#### Supplier

Select a single domain to use for the file. Alternatively, enter or select a supplier to replace the supplier in your file. [Learn more...](#)

Supplier Domain

Supplier

Lines will be rejected if they contain multiple domains and you do not select a domain here.

#### Operating Unit

Specify the operating unit for which this file is valid.

Operating Unit

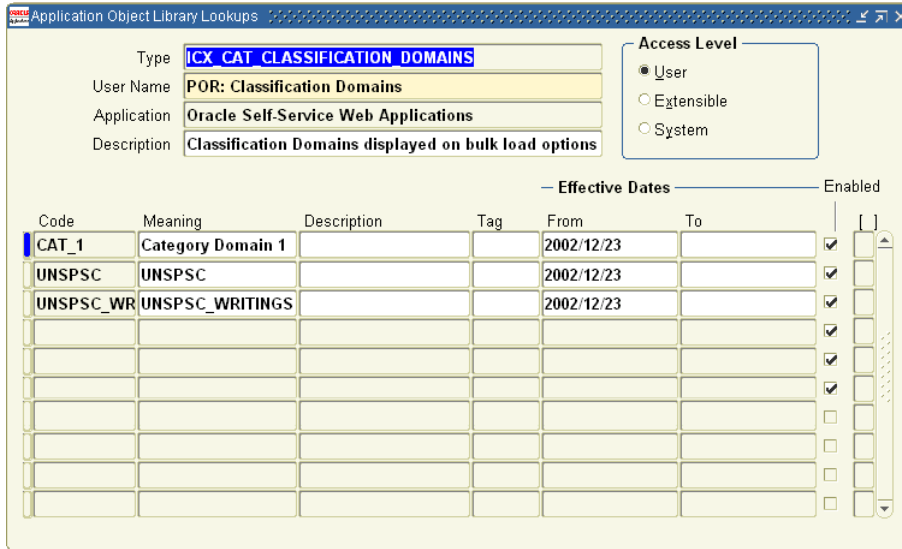
You do not have to define domains; however, if you do, they appear in the domains selection list when you click the flashlight icon. Defining the domains that you accept can provide consistency in the category and supplier names that are chosen for items in CIF or cXML files.

### Setup Steps

If you want to establish valid domains for your company that a catalog author can select on the **Specify Options** page, define them as lookups in Oracle Applications:

1. Log on to Oracle Applications using the Application Developer responsibility.
2. Access the Application Object Library Lookups window using the following navigation: Application > Lookups > Application Object Library.
3. Query the following lookup Types:
  - Use the Type ICX\_CAT\_CLASSIFICATION\_DOMAINS to define classification domains.
  - Use the Type ICX\_CAT\_SUPPLIER\_DOMAINS to define supplier domains.

**Figure 3–11 Application Object Library Lookups Window**



- For the lookup type, enter a Code and Meaning.

The Meaning displays to catalog authors when they click the flashlight icon next to the domain field on the Specify Options page.

- Optionally enter any of the other fields for each lookup code (domain) you define.

For more information on defining lookups, access the online Help for the Application Object Library Lookups window or see the *Oracle Application Developer's Guide*.

### Profile Options

None

### AK Regions/Attributes

Not applicable

### Function Security

The POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which files are bulk loaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

**Workflow**

None

**Implementation Considerations**

No additional considerations

### 3.3 Setting Up Contract AutoSourcing

Oracle iProcurement supports the association of a requisition line with a contract purchase agreement defined in Oracle Purchasing. This allows the automatic creation of standard purchase orders through the use of the PO Create Documents workflow. The standard purchase order that is created stores the contract number in the Purchase Orders window, in the Reference Documents tabbed region, in the Contract field. Oracle Purchasing adds the total amount of the purchase order line to the Released amount on the contract purchase agreement.

Associating a requisition line with a contract purchase agreement can be done in two basic ways, automatic or explicit.

**Automatic Contract Sourcing** If the PO Create Documents workflow option "Should Contract be used to autocreate the Doc?" is set to Yes, Oracle iProcurement checks whether there is a valid contract purchase agreement for the supplier and supplier site specified on the requisition. If there is, that contract is used. If multiple contracts exist for the supplier and supplier site, the latest created contract is used.

Automatic contract sourcing can be used for the following types of items:

- Bulk loaded, punchout, or transparent punchout catalog items where there exists a valid contract purchase agreement for the same supplier and supplier site associated with the item.
- Non-catalog requested items where there exists a valid contract purchase agreement for the same supplier and supplier site associated with the item.
- Extracted ASLs that are not linked to a source document and where there exists a valid contract purchase agreement for the supplier and supplier site specified on the ASL.

**Explicit Contract Sourcing** You can also explicitly enter a contract purchase agreement for an item in the catalog.

Explicit contract auto-sourcing can be used for the following types of items:

- Bulk loaded items that have an explicit reference to a contract purchase agreement in Oracle Purchasing.
- XML punchout or transparent punchout items for which the supplier hosting the content has specified a contract purchase agreement number that is valid in Oracle Purchasing.
- XML punchout or transparent punchout items from an Oracle Exchange marketplace where the buying company has specified on a supplier price list a valid contract purchase agreement number in Oracle Purchasing.

If a specific, valid contract purchase agreement number is given for an item, the PO Create Documents workflow references that contract purchase agreement on the purchase order, even if other valid contract purchase agreements exist for the supplier and supplier site.


The contract number for an item (when the contract reference is made explicitly) displays as shown in the following illustration:

Figure 3–12 Contract Number in Item Details

Stores
Categories
Shopping Lists
Non-Catalog Request

[Advanced Search](#)
[Shop Other Stores](#)

### Item Details



Super Roller II Rollerball Pen

Quantity:

<b>Supplier</b>	CE Office Supply
<b>Supplier Site</b>	
<b>Supplier Item</b>	CRO08521
<b>Internal Item Number</b>	
<b>Manufacturer Item</b>	CRO8521
<b>Manufacturer</b>	BIC
<b>Unit</b>	EA
<b>Unit Price</b>	400
<b>Currency</b>	JPY
<b>Contract Number</b>	852
<b>Long Description</b>	Cross refills for Selectip Rollerball pens.
<b>Category Name</b>	Cartridge Pen Ink Refills
<b>Ink Color</b>	Blue
<b>Model</b>	21
<b>Point Style</b>	Fine

#### Shopping Cart

You have saved carts.  
[Click here to view your saved carts.](#)

When explicitly specifying a contract purchase agreement number for an item, the number stays with the item even when the item is added to the favorites list; copied, changed, or resubmitted on a requisition; or saved in the shopping cart.

If the contract is not valid or becomes invalid (for example, is canceled), it still travels with the item and the requisition; however, the PO Create Documents workflow will not create the purchase order.

### Setup Steps

Perform the following steps if you want contract autosourcing to occur:

1. Create contract purchase agreements in Oracle Purchasing.  
See the *Oracle Purchasing User's Guide*.
2. Use the Oracle Workflow Builder to open the PO Create Documents workflow and set the attribute "Should Contract be used to autcreate the Doc?" to Yes.

Consider the other attributes as well. The attributes are as follows:

- Should Contract be used to autcreate the Doc?
- Is Contract Required on the Req Line?
- Should a Non-Catalog Request AutoSource From the Contract?

By default, these attributes are set to No. See [PO Create Documents](#) on page 2-54, for more information. See also the *Oracle Workflow Guide* and the *Oracle Purchasing User's Guide* for more guidance.

3. If you want to allow automatic contract sourcing, you don't need to do anything else.

If you want to explicitly associate specific contracts with catalog items, see the following two sections:

- [Using the Bulk Loader to Associate Items with Contract Purchase Agreements](#) on page 3-46
- [Associating Punchout and Transparent Punchout Items with Contract Purchase Agreements](#) on page 3-48

### 3.3.0.1 Using the Bulk Loader to Associate Items with Contract Purchase Agreements

When loading a catalog bulk load file, specify the operating unit(s) and contract purchase agreement(s):

- For XML and tab-delimited text files, specify the operating units and contract purchase agreement numbers at the header level of the file. Alternatively, you can select a valid operating unit and contract number from drop-down menus on the **Specify Options** page just before submitting the file.
- For CIF and cXML files, select a valid operating unit and contract number from the drop-down menus on the **Specify Options** page just before submitting the file.

Figure 3-13 Associating Contracts with Bulk Load Files Using the Specify Options Page

**ORACLE**  
**iProcurement**

[Return to Portal](#) [Help](#)

**Specify Options for File: example9.xml**

Enter additional information for the file.

**Supplier**

Select a supplier to replace the supplier in your bulk load file.

Supplier

**Operating Unit**

Specify the operating unit for which this file is valid.

Operating Unit

**Supplier Site**

If you selected a supplier and an operating unit, select the supplier site for this file.

Supplier Site

**Contract Purchase Agreement**

If you selected a supplier and an operating unit, select a contract purchase agreement that is applicable to all items in your file.

Contract Purchase Agreement

Contract Purchase Agreement Description

**Manage Catalogs and Stores**  
[Manage Catalogs](#)  
[Manage Stores](#)

**Download from Exchange**  
[Download Supplier Punchout Definition](#)

**Manage Items and Price Lists**  
[Download Resources](#)  
[Bulk Load Items & Price Lists](#)  
[View Bulk Load Status](#)  
[Mass Delete](#)

**Manage Schema**  
[Bulk Load Schema](#)  
[Edit Schema](#)  
[Build Table of Contents](#)  
[Map Oracle Categories](#)  
[Map Catalog Categories](#)

All items in the bulk load file are associated with the referenced contract purchase agreement(s).

---

---

**Note:** It may be necessary to split the data file into multiple files if some of the items should be associated with different contracts.

---

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For more information on the use of the bulk loader, including sample XML and text files, see the appendices later in this guide.

### 3.3.0.2 Associating Punchout and Transparent Punchout Items with Contract Purchase Agreements

In a punchout or in a transparent punchout to the supplier, the supplier can specify a contract number along with the item information. In a punchout or transparent punchout to an Oracle Exchange marketplace, the buyer can specify the contract number on a price list on the Exchange. Oracle iProcurement recognizes contract numbers only in an XML (not cXML) punchout.

For more information on specifying contract purchase agreements for punchout and transparent punchout items, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*.

#### Profile Options

POR: Default Currency Conversion Rate Type is used to perform currency conversions when automatic contract sourcing is used. See [Currency Validation](#) on page 3-49.

#### AK Regions/Attributes

Not applicable

#### Function Security

The POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which files are bulk loaded, if you use bulk loading to specify contract purchase agreements for items. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

#### Workflow

The PO Create Documents workflow provides three levels of support for contract automation using the following attributes in the poxwfatc.wft workflow file. Use the Oracle Workflow Builder to set these attributes in the poxwfatc.wft file according to your business practices and load the updated workflow file to the database.

- Should Contract be used to autcreate the Doc?
- Is Contract Required on the Req Line?
- Should a Non-Catalog Request AutoSource From the Contract?

For more information, see [PO Create Documents](#) on page 2-54, in [Chapter 2](#).

## Implementation Considerations

The following summarizes the business rules that are enforced when specifying a contract purchase agreement for an item, in either automatic or explicit sourcing.

**Supplier Validation** A bulk load file that contains contract purchase agreement references can only refer to one supplier, and the contract must be valid for that supplier.

In a punchout or transparent punchout, the contract purchase agreement number must be valid for the supplier and supplier site.

**Contract Purchase Agreement Validation** Only valid contract agreements may be referenced. Valid contracts include:

- Approved agreements
- Agreements that have not expired
- Agreements that have not been canceled
- Agreements that are not on hold
- Agreements that have not been finally closed

**Currency Validation** In a bulk load file, all prices and all contract purchase agreement references must be in the same currency, and that currency must match the contract purchase agreement currency. Otherwise, the items in the bulk load file are rejected during bulk loading.

In a punchout or transparent punchout where an explicit contract purchase agreement number is given, the item currency must match the contract currency. Otherwise, the purchase order is not created.

In automatic contract sourcing, Oracle iProcurement looks for a matching contract purchase agreement. If necessary, it performs currency conversion so that the resulting purchase order is in the same currency as the contract.

**Operating Unit Validation** The contract purchase agreement must be valid in the operating unit in which the item is requested.

If entering a contract number in a bulk load file, only one contract can be specified per operating unit. The contract number must be valid in that operating unit.

## 3.4 Managing Images

Images in the catalog are one of the following kinds:

- Images that display on the **Item Details** page when requesters view the details of an item. See [Figure 3-14](#) and [Figure 3-16](#). You can extract or bulk load items that reference these images.
- Smaller, thumbnail versions of the images that display on the **Search Results Summary**, **Search Results**, and **Compare Items** pages for items. See [Figure 3-15](#) and [Figure 3-17](#). You can extract or bulk load items that reference these images.
- Images associated with stores that display on the **Shop** home page. See [Figure 3-1](#). You can reference these images when creating your store.
- Images associated with a punchout or an informational catalog that display on the **Search Results Summary** page. See [Figure 3-3](#). You can reference these images when creating the punchout or informational catalog.

Including images in the catalog is optional. If you provide images for items, the corresponding image displays when a requester searches for and views items, assisting the user in selecting the correct item for purchase. JPEG and GIF image formats are recommended.

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**Note:** Images associated with transparent punchout items are hosted externally by the supplier site or marketplace. For more information, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*.

---

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Figure 3-14 Image on Item Details Page

Stores Categories Shopping Lists Non-Catalog Request **Shop** Requisition Status Receiving My Profile

Search Office Supplies   [Advanced Search](#) [Shop Other Stores](#)

Item Details



Super Roller II Rollerball Pen

Quantity:

Supplier	CE Office Supply
Supplier Site	
Supplier Item	CRO08521
Internal Item Number	
Manufacturer Item	CRO8521
Manufacturer	BIC
Unit	EA
Unit Price	400
Currency	JPY
Contract Number	852
Long Description	Cross refills for Selectip Rollerball pens.
Category Name	Cartridge Pen Ink Refills
Ink Color	Blue
Model	21
Point Style	Fine

Shopping Cart

You have saved carts.  
[Click here to view your saved carts.](#)

Figure 3–15 Thumbnail Images on Search Results Page

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help Diagnostics

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

Search Office Supplies   [Shop Other Stores](#)

### Search Results Summary from Regular Office Supplies: folder

[Hide Images](#) [View all results from Regular Office Supplies](#)

**Shopping Cart**

You have saved carts.  
[Click here to view your saved carts.](#)

**Compare Items**

No items selected.

**Catalog Language**

Your current catalog language:  
American English

[Change Catalog Language](#)

Standard Classification Folders, Legal, Blue

Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.



Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0008**  
 Manufacturer: **National Supplies** Manufacturer Item: Contract Number:

Price: **4.95 USD** Unit: **Each**

Quantity

Hanging Partition Fastener Folders, Ruby Red

Durable 25-point pressboard covers in 4 bright colors. 6 separate filing sections for documents and printouts. Sturdy kraft dividers with strong metal fasteners. Tear-resistant Tyvek gussets allow for 2 1/4" expansion. Adjustable tab for easy identification.



Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0007**  
 Manufacturer: **National Supplies** Manufacturer Item: Contract Number:

Price: **5.99 USD** Unit: **Each**

Quantity

Figure 3-16 Item Without an Image on Item Details Page

Stores Categories Shopping Lists Non-Catalog Request **Shop** Requisition Status Receiving My Profile

Search Office Supplies   [Advanced Search](#) [Shop Other Stores](#)

Item Details

**Shopping Cart**

You have saved carts.  
[Click here to view your saved carts.](#)

Super Roller II Rollerball Pen

Quantity:

<b>Supplier</b>	CE Office Supply
<b>Supplier Site</b>	
<b>Supplier Item</b>	CR008521
<b>Internal Item Number</b>	
<b>Manufacturer Item</b>	CR08521
<b>Manufacturer</b>	BIC
<b>Unit</b>	EA
<b>Unit Price</b>	400
<b>Currency</b>	JPY
<b>Contract Number</b>	852
<b>Long Description</b>	Cross refills for Selectip Rollerball pens.
<b>Category Name</b>	Cartridge Pen Ink Refills
<b>Ink Color</b>	Blue
<b>Model</b>	21
<b>Point Style</b>	Fine

Figure 3–17 Item Without a Thumbnail Image on Search Results Page

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help Diagnostics

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

Search Office Supplies   [Shop Other Stores](#)

### Search Results Summary from Regular Office Supplies: folder

[Hide Images](#) [View all results from Regular Office Supplies](#)

[Standard Classification Folders, Legal, Blue](#)

Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.

Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0008**  
 Manufacturer: **National Supplies** Manufacturer Item: Contract Number:

Price: **4.95 USD** Unit: **Each**

Quantity

[Hanging Partition Fastener Folders, Ruby Red](#)

Durable 25-point pressboard covers in 4 bright colors. 6 separate filing sections for documents and printouts. Sturdy kraft dividers with strong metal fasteners. Tear-resistant Tyvek gussets allow for 2 1/4" expansion. Adjustable tab for easy identification.



Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0007**  
 Manufacturer: **National Supplies** Manufacturer Item: Contract Number:

Price: **5.99 USD** Unit: **Each**

Quantity

**Shopping Cart**

You have saved carts.  
[Click here to view your saved carts.](#)

**Compare Items**

No items selected.

**Catalog Language**

Your current catalog language:  
 American English  
[Change Catalog Language](#)

---

**Note:** Individual requesters can use their My Profile preferences to disable thumbnail images in the search results if they desire. If so, the text description of the item fills the entire horizontal space, with no thumbnail image. Punchout and informational catalog images also do not display in the search results if the requester disables thumbnails.

---

### 3.4.1 Extracting Items with Images

You can associate items on blanket purchase agreements and catalog quotations with images to enhance the shopping experience.

## Setup Steps

Images on extracted blanket purchase agreement or quotation lines can be stored on a local server or specified in a URL.

### 3.4.1.1 Extracting Image Files Stored on a Local Server

To associate an image file with a blanket purchase agreement or quotation line item, perform the following steps:

1. Make sure the profile option POR: Extract BPA/Quote Images is set to Yes.
2. Populate the profile option, POR: Hosted Images Directory, with the directory path used to store image files.

This path usually corresponds to the OA\_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA\_MEDIA directory.

3. Copy your images to this directory.
4. Define Attribute 13 as a descriptive flexfield on the PO\_LINES table. Use this flexfield to store the image name, for example mech\_pencil.gif.

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**Note:** The file name for the image is case sensitive. For example, if the image file name is bluepen.gif, but you specify BluePen.gif in the descriptive flexfield, the image will not display.

---

---

5. Populate this flexfield for each blanket purchase agreement and catalog quotation line item that has an associated image.
6. Run the catalog extractor.

In Oracle iProcurement, the image appears on the **Item Details** page and as a thumbnail on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. If you want to resize the thumbnail image, see [Creating Thumbnail Images for Items](#) on page 3-60.

### 3.4.1.2 Extracting Image URLs

To associate an image URL with a blanket purchase agreement or quotation line item, perform the following steps:

1. Make sure the profile option POR: Extract BPA/Quote Images is set to Yes.

2. Define Attribute 14 as a descriptive flexfield on the PO\_LINES table. Use this flexfield to store the image URL, such as <http://www.oracle.com/homepageimages/logo.gif>.
3. Populate this flexfield for each blanket purchase agreement and catalog quotation line item that has an associated image URL.
4. Run the catalog extractor.

In Oracle iProcurement, the image appears on the **Item Details** page and as a thumbnail on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. If you want to resize the thumbnail image, see [Creating Thumbnail Images for Items](#) on page 3-60.

### **Profile Options**

The following profile options affect extraction of images:

- POR: Extract BPA/Quote Images should be set to Yes.
- POR: Hosted Images Directory should specify the directory path used to store image files. Usually the path is the location of your OA\_MEDIA directory.

### **AK Regions/Attributes**

Not applicable

### **Function Security**

None

### **Workflow**

None

### **Implementation Considerations**

If you specify both a server image and an image URL, only the server image displays in Oracle iProcurement.

You cannot extract images for master items that do not exist on a blanket purchase agreement or catalog quotation. If the master item exists on a requisition template or ASL entry with a supplier item number, then you can use the bulk loader to associate an image with the extracted item. (The bulk loader requires a supplier item number.)

By default, Oracle iProcurement uses blank image files (invisible to the requester) to display items that do not have images:

- `ag_placeholder_item.gif`—160 by 160 pixels, used on the **Item Details** page for items without images.
- `ag_placeholder_thumbnail.gif`—100 by 100 pixels, used on the **Search Results Summary**, **Search Results**, and **Compare Item** pages for items without thumbnail images.

If desired, you can replace the default blank image files with different image files. For example, if most of your items have images, you may want to display an image with the text **No Image Available** for the exceptions rather than a blank space. (This text would display the same in all languages.) See [Figure 3-16](#) and [Figure 3-17](#) for blank space images. The replacement blank image files must have the same names and file format (.gif) as the default ones. The default blank files can be found in the `OA_MEDIA` directory.

The following functionality can also be used to influence images, if you do not want to maintain images at all:

- The item detail visible descriptor property can be used to completely hide detailed images from the **Item Details** pages. See [Appendix C](#) for instructions.
- The search results visible descriptor property can be used to completely hide thumbnails from the **Search Results Summary** and **Search Results** pages, if desired. See [Appendix C](#) for instructions on using schema editing to show or hide descriptors like **Thumbnail Image**. (You can also use the **Edit Schema** page in the eContent Manager to alter the search results visible property.)
- The item detail visible descriptor property can be used to completely hide thumbnail images from the **Compare Item** page. See [Appendix C](#) for instructions.

## 3.4.2 Bulk Loading Items with Images

To bulk load images, use the `PICTURE` or `THUMBNAIL_IMAGE` fields in an XML bulk load file, or the **Image** or **Thumbnail Image** fields in a text bulk load file. These images can be either files stored internally or URLs that point to an image stored remotely.

You can also use the bulk loader to associate an image with an item you have extracted, if the item has a supplier item number. (The bulk loader requires a supplier item number.) See [Creating Thumbnail Images for Items](#) on page 3-60.

### 3.4.2.1 Specifying Image Files Stored on a Local Server

To reference image files stored on the local server:

1. For the POR: Hosted Images Directory profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA\_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA\_MEDIA directory.

2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Use the PICTURE field in an XML bulk load file (or the Image field in a text bulk load file) to specify an image for the **Item Details** page. Use the THUMBNAIL\_IMAGE field in an XML bulk load file (or the Thumbnail Image field in a text bulk load file) to specify a thumbnail image for the search results and comparison pages.

See the appendices for instructions on using bulk load files. See also [Creating Thumbnail Images for Items](#) on page 3-60.

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**Note:** The file name for the image is case sensitive. For example, if the image file name is bluepen.gif, but you specify BluePen.gif in the Image field, the image will not display.

---

---

4. Load your bulk load file.

### 3.4.2.2 Specifying Image URLs

To specify the URL of the image that resides on the Internet:

1. Obtain the full path of the image (for example, <http://www.oracle.com/toplogo2.gif>).
2. Use the PICTURE field in an XML bulk load file (or the Image field in a text bulk load file) to specify an image URL for the **Item Details** page. Use the THUMBNAIL\_IMAGE field in an XML bulk load file (or the Thumbnail Image field in a text bulk load file) to specify a thumbnail image URL for the search results and comparison pages.

See the appendices for instructions on using bulk load files. You can use the same image for both the image and thumbnail image, or create separately sized versions. See [Creating Thumbnail Images for Items](#) on page 3-60.

3. Load your bulk load file.

## Profile Options

POR: Hosted Images Directory should specify the directory path used to store image files. Usually the path is the location of your OA\_MEDIA directory.

## AK Regions/Attributes

Not applicable

## Function Security

The POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which files are bulk loaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

## Workflow

None

## Implementation Considerations

If you specify both an image URL (using the old PICTURE\_URL XML field or Image URL text field) and a server image (using the PICTURE XML field or Image text field) for an item, Oracle iProcurement displays the server image.

By default, Oracle iProcurement uses blank image files (invisible to the requester) to display items that do not have images:

- `ag_placeholder_item.gif`—160 by 160 pixels, used on the **Item Details** page for items without images.
- `ag_placeholder_thumbnail.gif`—100 by 100 pixels, used on the **Search Results Summary**, **Search Results**, and **Compare Item** pages for items without thumbnail images.

If desired, you can replace the default blank image files with different image files. For example, if most of your items have images, you may want to display an image with the text *No Image Available* for the exceptions rather than a blank space. (This text would display the same in all languages.) See [Figure 3-16](#) and [Figure 3-17](#) for blank space images. The replacement blank image files must have the same names and file format (.gif) as the default ones. The default blank files can be found in the OA\_MEDIA directory.

The following functionality can also be used to influence images, if you do not want to maintain images at all:

- The item detail visible descriptor property can be used to completely hide detailed images from the **Item Details** pages. See [Appendix C](#) for instructions.
- The search results visible descriptor property can be used to completely hide thumbnails from the **Search Results Summary** and **Search Results** pages, if desired. See [Appendix C](#) for instructions on using schema editing to show or hide descriptors like Thumbnail Image. (You can also use the **Edit Schema** page in the eContent Manager to alter the search results visible property.)
- The item detail visible descriptor property can be used to completely hide thumbnail images from the **Compare Item** page. See [Appendix C](#) for instructions.

### 3.4.3 Creating Thumbnail Images for Items

You can bulk load or extract items with thumbnail images, using an image file or image URL.

#### Setup Steps

There are two ways to create and size thumbnail images:

- Use the same image file name or URL for the Thumbnail Image (THUMBNAIL\_IMAGE) field as you used for the Image (PICTURE) field.

Specify the image file names or URLs through bulk loading or extracting. Then set the POR: Thumbnail Width or POR: Thumbnail Height profile options to resize the thumbnails. These profile options resize all thumbnails, while leaving the original image intact. Specify the desired number of pixels in these profile options. To resize the height and width proportionately, specify the number of pixels for just one profile option. For example, if you specify just POR: Thumbnail Width and leave POR: Thumbnail Height blank, the system automatically resizes the height proportionately to the width, for each thumbnail image. (If you specify both profile options, the sizing you specify is applied equally to all images. If the aspect ratio of an image is not the same as your sizing ratio, the thumbnail image may appear distorted.)

- If the item image and thumbnail image are different, use bulk loading to specify the separate image file names or URLs.

If you extracted the image, which uses the same image for both item details and thumbnails, use bulk loading to change one image or the other. The item must have a supplier item number to be updated by the bulk loader. You can use a picture editor to change the size of the thumbnail images. See [Bulk Loading Items with Images](#) on page 3-57.

## Profile Options

The following profile options affect thumbnail images:

- POR: Thumbnail Width (see description above)
- POR: Thumbnail Height (see description above)
- POR: Show Thumbnail Images (see [Profile Options](#) on page 2-8)

## AK Regions/Attributes

None

## Function Security

If you will be bulk loading image references, note that the POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which files are bulk loaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

## Workflow

None

## Implementation Considerations

The recommended height and width for thumbnail images is 100x100 pixels. You should not exceed a width of 280 pixels because the column width on the **Compare Items** page is 280 pixels; if the thumbnail image exceeds that, the image will wrap.

By default, Oracle iProcurement uses a blank image file (invisible to the requester) to display items that do not have images. For thumbnail images, used on the **Search Results Summary**, **Search Results**, and **Compare Item** pages, it uses ag\_placeholder\_thumbnail.gif (100 by 100 pixels) as the default blank image.

If desired, you can replace the default blank image file with a different image file. For example, if most of your items have images, you may want to display an image with the text **No Image Available** for the exceptions rather than a blank space. (This text would display the same in all languages.) See [Figure 3-17](#) for a blank space image. The replacement blank image file must have the same name and file format (.gif) as the default one. The default blank file can be found in the OA\_MEDIA directory.

The following functionality can also be used to influence images, if you do not want to maintain images at all:

- The search results visible descriptor property can be used to completely hide thumbnails from the **Search Results Summary** and **Search Results** pages, if desired. See [Appendix C](#) for instructions on using schema editing to show or hide descriptors like Thumbnail Image. (You can also use the **Edit Schema** page in the eContent Manager to alter the search results visible property.)
- The item detail visible descriptor property can be used to completely hide thumbnail images from the **Compare Item** page. See [Appendix C](#) for instructions.

### 3.4.4 Creating Store or Catalog Images

Stores, punchout catalogs, and informational catalogs can also be set up to display images, if desired.

#### Setup Steps

Store and catalog images can be either files stored internally or URLs that point to an image stored remotely.

#### 3.4.4.1 Specifying Image Files on a Local Server

To specify an image stored on the local server:

1. For the POR: Hosted Images Directory profile option, enter the directory path you use to store image files.  
  
This path usually corresponds to the OA\_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA\_MEDIA directory.
2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Access the Internet Procurement Catalog Administration responsibility and, in the eContent Manager, click "Create Stores" to add an image for a store; click "Create Catalogs" to add an image for a punchout or informational catalog.
4. Specify the image file name in the Image field for the store or catalog.  
  
See the online Help if you need more information.

#### 3.4.4.2 Specifying Image URLs

To specify the URL of the image that resides on the Internet:

1. Access the Internet Procurement Catalog Administration responsibility and, in the eContent Manager, click "Create Stores" to add an image for a store; click "Create Catalogs" to add an image for a catalog.
2. Specify the complete image URL (such as <http://www.oracle.com/toplogo2.gif>) in the Image field for the store or catalog.

See the online Help if you need more information.

### **Profile Options**

If using image files stored on a local server, POR: Hosted Images Directory should specify the directory path used to store the image files. Usually the path is the location of your OA\_MEDIA directory.

### **AK Regions/Attributes**

Not applicable

### **Function Security**

The POR\_SSP\_ECMANAGER function controls access to the eContent Manager page from which stores and catalogs are defined. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

### **Workflow**

None

### **Implementation Considerations**

The recommended image dimensions for a store or catalog image is 70 by 55 pixels.

By default, Oracle iProcurement uses a blank image file (invisible to the requester) to display items that do not have images. For stores without images on the **Shop** home page, it uses `ag_placeholder_store.gif` (70 by 55 pixels) to display the blank image. (Punchout and informational catalogs have no default blank image. When no image is specified, they display only the catalog name and description on the **Search Results Summary** page.)

If desired, you can replace the default blank image file with a different image file. For example, if most of your stores have images, you may want to display an image with the text **No Image Available** for the exceptions. (This text would display the same in all languages.) The replacement blank image file must have the same name

and file format (.gif) as the default one. The default blank file can be found in the OA\_MEDIA directory.

## 3.5 Defining Realms

Realms are securing attributes used to control access to the catalog as an additional layer for application security. You can create the following two kinds of realms:

- A category realm is a set of access privileges to categories contained in the local catalog.
- An item source realm is a set of access privileges to punchout, transparent punchout, or informational catalogs.

Once you create a realm, you assign it to a responsibility or user. The requester associated with that responsibility or user can see whatever categories or item source catalogs are contained in that realm.

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**Note:** If you restrict a requester's access, using realms, to all catalogs in a store, the store does not display at all to the requester.

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### 3.5.1 Category Realms Example

Assume the following item categories exist in the local catalog:

- Medical/Surgical Equipment
- Medical/Surgical Supplies
- Notepads
- Writing Instruments

Because of the nature of the items contained in the Medical/Surgical categories, only certain requesters are allowed to create requisitions for these items. You create two realms. One realm grants access to all of the categories mentioned above and is assigned to the iProcurement MedSurge responsibility. The other realm grants access only to the Notepads and Writing Instruments categories and is assigned to the Internet Procurement responsibility.

Any requester who logs in using the iProcurement MedSurge responsibility has access to items in all of the categories mentioned above. A requester who logs in using the Internet Procurement responsibility has access only to items in the

Notebooks and Writing Instruments categories. Alternatively, or additionally, you could assign these realms to individual users.

### 3.5.2 Item Source Realms Example

Assume the following remote catalogs are defined in Oracle iProcurement:

- Exchange.Oracle.com (transparent punchout)
- Office Supplies Unlimited (transparent punchout)
- Computer Components Corporation (punchout site)

Company policy limits the purchasing of computer hardware to the Information Technology (IT) department. To adhere to this policy and restrict certain requesters from ordering these types of items, two realms are created. One realm grants access to all of the remote catalogs mentioned above and is assigned to members of the IT department. The other realm grants access only to Exchange.Oracle.com and Office Supplies Unlimited. This realm is assigned to all other requesters. You can assign the realms to a responsibility (which assigns it to all requesters who use that responsibility), to individual requesters, or both.

### 3.5.3 Responsibility and User Access to Realms

Until you assign realms, users have access to all categories and to all punchout, transparent punchout, and informational catalogs defined in Oracle iProcurement. Once you assign a realm, the affected requester or requesters have access only to the data in the assigned realm.

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**Note:** You can use realms either to control access to categories in the local catalog (using category realms) or to control access to a punchout, transparent punchout, or informational catalog (using item source realms). For example, you cannot restrict a user's access to categories within a punchout or transparent punchout. You cannot use realms to control access to an entire local catalog.

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Realms are *additive*. For example, when you assign a realm to a responsibility, all requesters assigned that responsibility have access to that realm; however, you can assign additional realms to any of these individual requesters that only they have access to.

In the following example, both users 1 and 2 are assigned the Internet Procurement responsibility and have access to the Exchange.Oracle.com catalog. Additionally, User 2 has access to the Computer Components catalog and the Routers category.

Realm 1	Realm 2	Responsibility: Internet Procurement	User 1	User 2	Result
Item Source = Exchange.Oracle.com	Item Source = Computer Components  Category = Routers	Assigned to Realm 1	Not assigned additional realms	Assigned to Realm 2	User 1 has access to Exchange.Oracle.com.  User 2 has access to the Exchange.Oracle.com and Computer Components catalogs and to the Routers category in the local catalog.

### Setup Steps

Setting up realms consists of three basic steps:

1. Create the realm.
2. Assign the realm to a responsibility.
3. Optionally assign realms to individual users if desired.

To use realms, you must at a minimum "secure" the responsibility that the requesters use to access Oracle iProcurement. Securing a responsibility consists of entering ICX\_POR\_REALM\_ID in the Name field for the responsibility as described in the steps below. Next, as described in the steps below, assign a realm ID to that responsibility, to requesters (users) in that responsibility, or both, as your needs require.

If you secure a responsibility with ICX\_POR\_REALM\_ID and do not assign a realm ID, the responsibility is "secured" against accessing any categories or item source catalogs. Anyone assigned to that responsibility does not have access to any categories or item source catalogs—until you assign a realm ID to the responsibility or user.

The table below demonstrates the following basic principles:

- *First row of the table.* If you secure a responsibility and assign no realms, requesters cannot access any catalogs or categories.
- *Second row of the table.* As soon as you assign an item source realm to a responsibility, the requester has access to that realm and all categories. In other words, assigning an item source realm at the responsibility level "adds back"

access to all categories, and vice versa. (If you assign a category realm to a responsibility, the requester has access to those categories and all item source realms.) This behavior preserves similar behavior from previous releases.

- *Third row of the table.* If you secure a responsibility and assign a realm at the user level, the requester has access to nothing except the user-assigned realm.
- *Fourth row of the table.* If you assign an item source realm to a responsibility and a category realm to the user, the user-level realm is ignored. Assigning an item source realm to a responsibility frees up access to all categories, so adding a category realm at the user level is redundant. (Likewise, if you assign a category realm to a responsibility and an item source realm to the user, the user-level realm is ignored.)

**Table 3–4 Examples of Secured Responsibilities and Realms**

Securing Attribute for Responsibility	Responsibility Realm	Securing Attribute for User	User Realm	Result
ICX_POR_REALM_ID	None assigned	None assigned	None assigned	Assuming the requester logs on using the secured responsibility, the requester cannot access any catalogs or categories.

**Table 3–4 Examples of Secured Responsibilities and Realms**

Securing Attribute for Responsibility	Responsibility Realm	Securing Attribute for User	User Realm	Result
ICX_POR_REALM_ID	Item Source = Exchange.Oracle.com	ICX_POR_REALM_ID	Item Source = Office Supplies Unlimited	Requester can access the Exchange.Oracle.com and Office Supplies Unlimited catalogs and all categories. (Assigning the item source realm at the responsibility level frees up access to all categories.)
ICX_POR_REALM_ID	None assigned	ICX_POR_REALM_ID	Item Source = Exchange.Oracle.com	At the responsibility level, ICX_POR_REALM_ID secures against access to any catalog or category. Since the requester is assigned a realm that contains the Exchange.Oracle.com catalog, however, the requester has access to that catalog. Since the requester is not assigned a category realm, the requester has no access to any categories (no access to local content).
ICX_POR_REALM_ID	Item Source = Office Supplies Unlimited	ICX_POR_REALM_ID	Category = Computers	Requester can access the Office Supplies Unlimited catalog and all categories in the local catalog. Since category realms are not restricted at the responsibility level (and realms are additive), the user-level category realm is ignored.

### 3.5.3.1 Create the Realm

To create a realm:

1. Log in to Oracle Purchasing and use the following navigation path to open the Realms window: Setup > E-Catalog Admin > Realms.
2. In the Realms window, enter your own Name and Description for the realm.

**Figure 3–18 Realms Window**

3. Select either of the following as the Component Type:
  - Item Source, to define a realm for a punchout, transparent punchout, or informational catalog.
  - Category, to define a realm for categories in the local catalog.
4. In the Components section, use the list of values (LOV) to select the catalog or category to which anyone assigned this realm has access.
5. Save your changes.
6. Note the Realm ID that is automatically assigned to the realm. You will need to reference this ID later.

### 3.5.3.2 Assign the Realm to a Responsibility

To assign the realm to a responsibility:

1. Log on to Oracle Applications using the System Administrator responsibility.
2. Open the Responsibilities window using the following navigation path: Security > Responsibility > Define.
3. Query the responsibility to which you will assign the realm.

**Figure 3–19 Responsibilities Window**

Responsibility Name: IPG iProcurement

Application: Oracle Self-Service Web Applications

Responsibility Key: IPG\_IP\_PROJ

Description: IPG iProcurement

Effective Dates: From: 25-FEB-2002, To:

Available From:
 

- Oracle Applications
- Oracle Self Service Web Applications
- Oracle Mobile Applications

Menu: Internet Procurement Home

Web Host Name:

Web Agent Name:

Data Group:
 

- Name: Standard
- Application: Oracle Self-Service Web Applicati

Request Group:
 

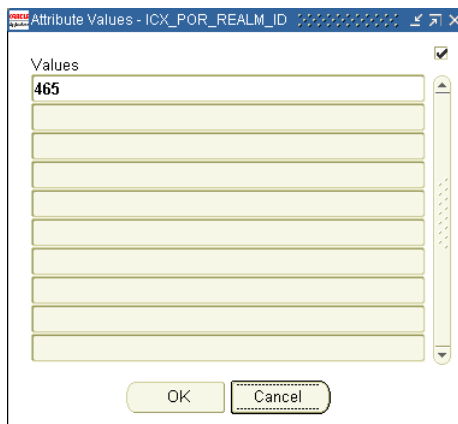
- Name:
- Application:

Securing Attributes

Name	Application
ICX_POR_REALM_ID	Oracle Self-Service Web Applications

Values...

4. In the Securing Attributes tabbed region, in the Name field, use the LOV to select ICX\_POR\_REALM\_ID.
5. Choose the Values button.
6. In the Values fields, enter the Realm ID that you noted earlier for each realm you want to assign to this responsibility.

**Figure 3–20 Realm ID in Attribute Values Window**

7. Click OK.
8. Save your changes.
9. Repeat these steps for each responsibility to which you want to assign the realms.

### 3.5.3.3 Assign the Realm to Users (Optional)

To assign the realm to users:

1. Log on to Oracle Applications using the System Administrator responsibility.
2. Open the Users window using the following navigation path: Security > User > Define.
3. Query the user (person) to whom you want to assign the realm.
4. In the Securing Attributes tabbed region, in the Attribute field, use the LOV to select ICX\_POR\_REALM\_ID.

**Figure 3–21 Users Window**

The screenshot shows the Oracle Users window for user RKORTE. The user's name is RKORTE, description is Rachel, and person is Korte, Rachel. The password expiration is set to None. The effective dates are from 12-APR-2002 to an empty field. The Securing Attributes tab is active, showing a table with one entry: ICX\_POR\_REALM\_ID for Oracle Self-Service Web App with a value of 465.

Attribute	Application	Value
ICX_POR_REALM_ID	Oracle Self-Service Web App	465

5. For the Value, enter the Realm ID that you noted earlier for the realm you want to assign to the user.
6. In the Securing Attributes tabbed region, create a line for each realm you want to assign to the user. Select ICX\_POR\_REALM\_ID in the Name field and the Realm ID for each realm.
7. Save your work.

**Profile Options**

None

**AK Regions/Attributes**

Not applicable

**Data Security**

The following securing attribute applies to this feature:

- ICX\_POR\_REALM\_ID assigned at the responsibility level. It can also be assigned at the user level, if the realm is assigned to a user.

**Workflow**

None

**Implementation Considerations**

Categories restricted by realms display to requesters when browsing categories; however, the items in those categories do not display. Category realms restrict access to items in the excluded categories.

If you are upgrading from a previous release, the following securing attributes from the previous release continue to work:

- RT\_CATEGORY\_ID assigned at the responsibility level (for category realms).
- ICX\_POR\_ITEM\_SOURCE\_ID assigned at the responsibility level (for item source realms).

You can use the new securing attribute, ICX\_POR\_REALM\_ID, along with previous securing attributes you implemented.

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**Note:** Going forward, it is recommended that you use ICX\_POR\_REALM\_ID.

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# Requisitions

This chapter describes the implementation steps specific to requisitioning (ordering) in Oracle iProcurement. It is divided into two major sections; the setup steps normally performed during initial implementation and those setups which primarily relate to the requester usage of Oracle iProcurement.

- Preliminary Setup Steps
- Setting Up the Requester Usage Features

## 4.1 Preliminary Setup Steps

This section describes the setup steps that normally are performed before configuring the user interface related features of Oracle iProcurement. Setups included in this section are:

- [Multiple Chart of Accounts](#)
- [Configure Account Regions \(Required\)](#)
- [Expense Charge Account Rules](#)
- [Suggested Buyer](#)
- [Internal Requisitions](#)
- [Purchase Order Grouping for Requisition Lines with One-Time Addresses](#)
- [Employee P-Cards](#)
- [Supplier P-Cards](#)
- [Purchase Order \(PO\) Extract for P-Card Reconciliation](#)
- [Project Accounting Integration](#)
- [Grants Accounting Integration](#)

## 4.1.1 Multiple Chart of Accounts

If your organization has multiple Chart of Accounts, you must configure the following two profile options:

- POR: Edit Accounts Region
- POR: Multiple Accounts Region

### Setup Steps:

1. Copy the Account regions POR\_BILLING\_MULT\_CHARGE\_AC\_R and POR\_BILLING\_CHARGE\_ACCOUNT\_R.
2. Rename the new regions created in step 1.
3. Modify the region so that the prompt names and field lengths of the accounting segments match the accounting structure for the Chart of Accounts.
4. Assign the name of the new regions to the following profile options:
  - POR: Edit Accounts Region: This profile option should be set to the new region name corresponding to POR\_BILLING\_CHARGE\_AC\_R created in step 2.
  - POR: Multiple Accounts Region: This profile option should be set to the new region name corresponding to POR\_BILLING\_MULT\_CHARGE\_ACCOUNT\_R created in step 2.

See [Section 2.4, "Profile Options"](#) on page 2-8 for detailed instructions.

For more information, see: *Web Applications Dictionary, Oracle Self-Service Web Applications Implementation Manual, Release 11i.*

### Profile Options

POR: Edit Accounts Region

POR: Multiple Accounts Region

### AK Regions/Attributes

None

### Function Security

None

### **Workflow**

None

### **Implementation Considerations**

No additional

## **4.1.2 Configure Account Regions (Required)**

The accounting regions must be configured for iProcurement so that they match the accounting structure of your organization in general. This must be done prior to using the iProcurement application. The following regions must be configured to match the accounting structure of your organization:

- POR\_BILLING\_MULT\_CHARGE\_AC\_R
- POR\_BILLING\_CHARGE\_ACCOUNT\_R

These two regions represent the different pages in iProcurement where the charge account information can be modified. As such, the region items must be configured so that only the applicable accounting segments are displayed. By default, the first five segments are set to display (and are updatable).

### **Setup Steps:**

1. Determine your accounting structure: Ascertain which accounting segments are being used.
2. Modify the above two regions so that the appropriate region items (i.e. the accounting segments) display and are updatable. The details to each segment to be used must be modified to reflect the business' accounting structure.
3. Restart iAS.

### **Profile Options**

None

### **AK Regions/Attributes**

None

### **Function Security**

None

**Workflow**

None

**Implementation Considerations**

None

### 4.1.3 Express Setup Tool

The Express Setup Tool allows for the fast definition and creation of locations, employees, and requester information using a web-based interface. It is also possible to update certain location and employee related fields using this tool.

The Express Setup tool is targeted towards rapid implementation for small to mid-size companies and supports uploading of up to 500 records at one time.

**Setup Steps:**

1. Login to Oracle Applications and choose the Procure-to-Pay Administrator responsibility.
2. Navigate to the Express Setup Tools window.
3. Links exist within the Express Setup Tools window where both a Location and Employee template can be downloaded. This template contains instructions specifying how to create your data file.
4. Once the data file has been created it can be loaded through the Express Setup Tools window.
  - a. Login as in step 1 and 2 above.
  - b. Enter or browse for your file name from either the Locations or Employees File Name field.
  - c. Click Start Load Now.
5. Following a data load, a log will appear that lists both the number of records loaded and not loaded successfully. A detailed description is given as to why a certain record did not load successfully. The browser cache should be cleared before viewing the most recent log file.

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**Note:** The profile Apps Servlet Agent must be set before using the Express Setup Tool.

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## **Profile Options**

None

## **AK Regions/Attributes**

None

## **Function Security**

Through function security requesters can be prohibited from loading locations, employees, and requesters through the Express Loader Tool by excluding the function Express Setup Tools. See [Section 2.6, "Security"](#) on page 2-34 for detailed instructions.

## **Workflow**

None

## **Implementation Considerations**

- The Employee Number can only be loaded when it has been set to Manual. When set to Automatic the system will reject the records containing employee numbers.
- The Employee Number should be unique for every requester.
- The name of the employee will be stored exactly as it is entered. Case conversion will not be performed. This means that an employee entered as tOM SmiTH in Express Setup will appear exactly in this manner.
- Once a start date has been entered it cannot be predated.
- Specifying the End-Date for an employee is not supported. A requester would have to log into Oracle Applications to do this.
- The location specified on the Express Setup table for the employee must have already been created in Oracle Application prior to its being loaded through the table.
- Data Load Sequence:
  - Building on the previous note, the location loader should always be run before the employee loader.
  - The supervisor of an employee should already be defined in the system before entering the employee.
- The application user password cannot be updated using the loader.

- The loader only supports the American English language.
- Considerations when express loading locations:
  - The loader only supports the address style of **United States**.
  - Locations cannot be defined as **Global** using the loader.
  - The loader only supports the American English language.

#### 4.1.4 Expense Charge Account Rules

When determining the default charge account, the account generator may reference the charge account defined on the employee record. Expense Charge Account Rules enable you to override one or multiple segments of that default account based on the item category. This ability to override does not interfere with the action of the account generator, but simply replaces those segments you configure after the account generator has created a charge account.

##### **Setup Steps:**

1. Log into Oracle Applications and choose the Procure to Pay Administrator responsibility.
2. Navigate to Purchasing Setup > Financials > Accounting > Expense Account Rules.
3. Define the rules (per item category) in the window displayed. Duplicate rules for the same category or account segment are not permitted.
4. Save your work.

##### **Profile Options**

None

##### **AK Regions/Attributes**

None

##### **Function Security**

None

##### **Implementation Considerations**

None

## 4.1.5 Suggested Buyer

As requisitions are created in iProcurement it is possible to indicate the suggested buyer for each requisition and requisition line. A buyer can be defined on any of the following:

1. Blanket Purchase Agreement or Quotation
2. Requisition Template
3. Item
4. Category

If a buyer is found on any of the above, then it will be defaulted onto the corresponding purchase requisition based on its position in the document hierarchy expressed above. The Oracle iProcurement requester may accept this default or override it based on the Suggested Buyer LOV. This suggest buyer information is then passed to the resulting purchasing document and may be overridden during the document creation process.

### Setup Steps:

None

### Profile Options

The following profile must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

HR: Cross Business Groups (allows buyers to be defaulted from other business groups)

### AK Regions/Attributes

The applicable regions and associated attributes are:

**Table 4–1 Suggested Buyer AK Structure**

Region Name	Attribute Name
POR_DELIVERY_SINGLE_ROW_R	POR_BUYER POR_BUYER_ID
POR_DELIVERY_MULTI_ROW_R	POR_BUYER POR_BUYER_ID

**Table 4-1 Suggested Buyer AK Structure**

Region Name	Attribute Name
POR_DELV_INFO_SELECTED_LINE_R	POR_BUYER POR_BUYER_ID
POR_POWER_SINGLE_ROW_R	POR_BUYER POR_BUYER_ID
POR_POWER_MULTIPLE_ROW_R	POR_BUYER POR_BUYER_ID
POR_REV_LINE_DETAIL_R	POR_BUYER POR_BUYER_ID
POR_OD_LINE_DETAIL_R	POR_BUYER POR_BUYER_ID

By default these attributes are disabled. To enable these attributes modify the above regions and check the Node Display check box for the new attributes.

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**Note:** If changes are made to any AK Regions, then iAS must be restarted for the changes to be reflected in iProcurement.

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## Function Security

None

## Workflow

The Get Buyer process of the PO Create Documents workflow retrieves buyer information for the purchase order when it is being created. For standard purchase orders, this process will retrieve the buyer from the requisition line (through the Get Buyer From Req Line function). If no buyer is defined at the requisition level, then the item master, category, source document, and contract are subsequently checked. When a blanket release is created, the buyer will be retrieved from the blanket agreement, regardless of the buyer defined on the associated requisition.

## Implementation Considerations

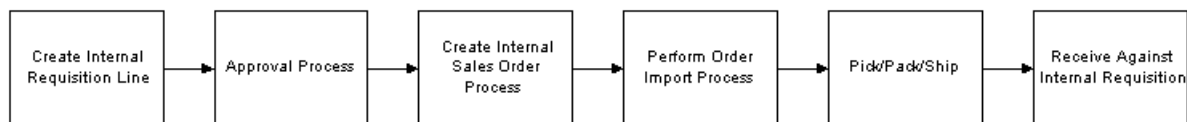
- When using the Category to determine the default buyer, Oracle iProcurement will cross business group boundaries when selecting the default buyer if the profile HR: Cross Business Groups is set to Yes. Also, when set to Yes, this

profile will enable the buyer LOV to cross business groups, enabling the user to select an employee from another business group as the suggested buyer.

## 4.1.6 Internal Requisitions

In a buying organization, goods are sourced either from external suppliers or from internal inventory and warehouse locations. Externally sourced items are requested using purchase requisitions and items sourced from an internal source are requested using internal requisitions. Internal requisition creation is supported in Oracle iProcurement. Internal requisitions are not converted into purchasing documents (purchase orders or blanket releases). Rather, internal requisitions are converted into internal sales orders. These internal sales orders are subsequently processed and then the requested items can be received in Oracle iProcurement. A summary diagram of the process is provided below:

**Figure 4–1 internal Requisition Process Flow**



### Overall Setup Steps for Internal Requisitions:

See “Overview of Internal Requisitions” in the *Oracle Purchasing User’s Guide*.

### Manual Source Selection Setup Steps:

The ability to manually select source information is available through the **Select Item Source** page (accessed by clicking Select Source) from one of the following pages:

- **Catalog Search Results**
- **Compare Items**
- **Item Details**
- **My Favorites List**
- **Public Shopping List Items**

**Source Subinventory Setup Steps:**

In addition to Oracle iProcurement determining the source organization, the source subinventory is also defaulted. When sourcing is automatic and transparent, and the source is determined to be an internal organization, the subinventory with the greatest available inventory is selected. If multiple subinventories have equal available inventory, then the first subinventory alphabetically is defaulted. If all subinventories have zero available inventory, then no subinventory is defaulted. The available inventory figure is an estimate only and is defined as:

[INVENTORY ON HAND - RESERVED INVENTORY IN SUBINVENTORY]

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**Note:** If inventory is reserved without an indication of subinventory, then that reservation is not included in the available inventory calculation.

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When requesters manually select the source information, all available subinventories that are enabled for quantity tracking are displayed in a drop down box. The available inventory per subinventory is shown along side the subinventory value in the drop down box.

To change the subinventory field from a drop down box to an LOV on the **Select Item Source** page, change the item style for the attribute POR\_SRC\_SUBINV\_CODE in the region POR\_SRC\_INTERNAL\_R to Text.

**Checkout and Validation (Mixed Lines) Setup Steps:**

It is possible to include both internally sourced and supplier sourced lines on a single requisition. However, because of additional constraints for internally sourced lines, during checkout extra validation is performed on the internally sourced lines.

A comparison of the checkout validation between supplier sourced lines and internally sourced lines is given in the table below:

**Table 4–2 Item Checkout Validation**

Field / Attribute	Supplier Sourced Line	Internally Sourced Line
Deliver-Location	Item must belong to the organization associated with the deliver-to location	<ol style="list-style-type: none"> <li>1. Item must belong to the organization associated with the deliver-to location.</li> <li>2. If changed, the new location must not result in a new destination organization.</li> <li>3. The location must be associated with a customer.</li> </ol>
One-Time Address	None	Cannot deliver internally sourced items to a one-time address.
Requester	None	New requester cannot result in a new deliver-to location that infringes on the above deliver-to location rules.
Buyer	None	Buyer cannot be entered.
Charge Account	Non-modifiable if destination is inventory.	<ol style="list-style-type: none"> <li>1. Non-modifiable if destination is inventory.</li> <li>2. If destination is expense, cannot allocate to multiple charge accounts.</li> </ol>

It is possible to create internal requisitions for both expense and inventory destinations.

All three checkouts are available for processing internal requisition lines. Regardless of the checkout method selected, at the end of the checkout process a single requisition, containing both internal and external lines is created. This requisition is then routed through the same approval path as a requisition with all purchase requisition lines. Upon approval, the internally sourced lines are converted into internal sales orders and the externally sourced lines are converted into purchasing documents (purchase orders or blanket releases).

It is possible to receive internal orders in Oracle iProcurement. See [Section 5.1.1, "Receipt Creation"](#) for details.

### Profile Options

The following profile must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

PO: Legal Requisition Type

POR: Allow Manual Selection of Source

POR: Select Internal Requisition for Confirm Receipts

POR: Select Inventory Replenishment Lines for Confirm Receipts

MRP: Default Sourcing Assignment Set

**AK Regions/Attributes****Table 4–3 Internal Requisition Related Regions and Attributes**

<b>Region Name</b>	<b>Attribute Name</b>
POR_SRC_EXTERNAL_R	POR_SLECT_RADIO
	POR_SUPPL_NAME
	POR_SUPPL_SITE
	POR_SOURCE_DOC_NUM
	POR_UNIT_OF_MEASURE
	POR_SUPPLE_ITEM_PRICE
POR_SRC_INTERNAL_R	POR_SELECT_RADIO
	POR_SRC_ORG
	POR_SRC_ORG_ID
	POR_SRC_SUBINV_CODE
	POR_UNIT_OF_MEASURE
	POR_UNIT_PRICE
POR_SRC_ITEM_R	POR_ITEM_DESCRIPTION
	POR_INT_ITEM_NUM
	POR_CATEGORY
POR_SRC_SUBINV_LOV_R	POR_SRC_ORG
	POR_SRC_SUBINV_CODE
	POR_UNIT_OF_MEASURE
	POR_SRC_SUBINV_AVAIL

**Table 4–4 AK Regions for Internal Requisitions**

<b>Region Name</b>	<b>Attribute Name</b>
POR_OD_LINES_R	POR_ORDER_TYPEPOR_PO_NUMBER *
POR_OD_LINE_DETAIL_R (expanded)	POR_SRC_SUBINVENT
	POR_ORDER_TYPE
	POR_ORDER_CREATION_DATE
	POR_PO_NUMBER *
POR_REV_LINE_DETAILS_R	POR_SRC_SUBINVENT
POR_PRINTER_FR_LINES_R	POR_SRC_SUBINVENT

**Table 4–4 AK Regions for Internal Requisitions**

Region Name	Attribute Name
POR_PERSONAL_FAV_LIST_R	POR_STOCKED_INTERNALLY
POR_PUBLIC_LIST_ITEMS_R	POR_STOCKED_INTERNALLY
POR_RCV_ITEMS_HOME_R	POR_PO_NUMBER *
POR_RCV_ORD_LINES_R	POR_ORDER_TYPE POR_PO_NUMBER *
POR_RCPT_EXP_SRCH_R	POR_PO_NUMBER *

\* The label for the attribute POR\_PO\_NUMBER was modified so that it now reads Order Number (instead of Purchase Order).

In each corresponding AK region, the attributes are enabled for display by default. To change this initial setting, the Node Display field must be unchecked.

### Function Security

None

### Workflow

The Confirm Receipts workflow has been modified so that past due shipments for internal requisitions can be selected.

### Implementation Considerations:

- Purchasing sourcing is only called and applied when an internally orderable item is selected. If a strictly purchasable item is selected, then no sourcing is applied.
- If the profile PO: Legal Requisition Type = Internal then the following are true:
  - It is not possible to sort by unit price.
  - Strictly purchasable items are not displayed.
  - Displaying the Stocked Internally column depends on the setting of the profile POR: Allow Manual Selection of Source.
  - Items which are both purchasable and internally orderable are only displayed as internally orderable.
  - All prices on the catalog pages are null.

- If the profile PO: Legal Requisition Type = Purchase then the following are true:
  - The Stocked Internally column does not display regardless of the setting of the profile POR: Allow Manual Selection of Source.
  - No sourcing is called.
- If the profile PO: Legal Requisition Type = Both then the following is true:
  - Display of the Stocked Internally column depends on the setting of the profile POR: Allow Manual Selection of Source.
  - If both internal and external items have been extracted into the catalog, then both item types are displayed.
- In order for the Stocked Internally column to be displayed on the public list items and favorites list pages, the AK attribute POR\_STOCKED\_INTERNALLY must be set to display. If the field Node Display is not checked, then the Stocked Internally column is not displayed regardless of the profile setting of POR: Allow Manual Selection of Source. This does not apply to the **Catalog Search Results** page.
- When an item is internally sourced, the unit of issue from the source organization is used. The transfer price is calculated based on the cost price of the source organization and the unit of measure conversion rates.
- General planning information is not used when determining the source for a given item. All sourcing is based on the sourcing rules defined.
- If a requisition has both internally and externally sourced lines and the delivery information is changed at the header level, then the deliver-to location validation is different for each line type. The LOV for the deliver-to location provides a list of all deliver-to locations. If a location that is invalid for internal line items is selected, then this location is not applied to those lines. During standard checkout, a warning is displayed to the requester.
- It is not possible to add information templates to internally sourced lines.
- It is not possible to modify the source information during checkout. To modify the source, requesters have to delete the item from the shopping cart and then re-select the item from the catalog.
- The source defined on a requisition template (public list) is not used when the source is determined by iProcurement. Sourcing is strictly based on sourcing rules.
- The tip text indicating that the quantity figure is an estimate is only displayed on the Select Item Source information page if the *item style* for the source

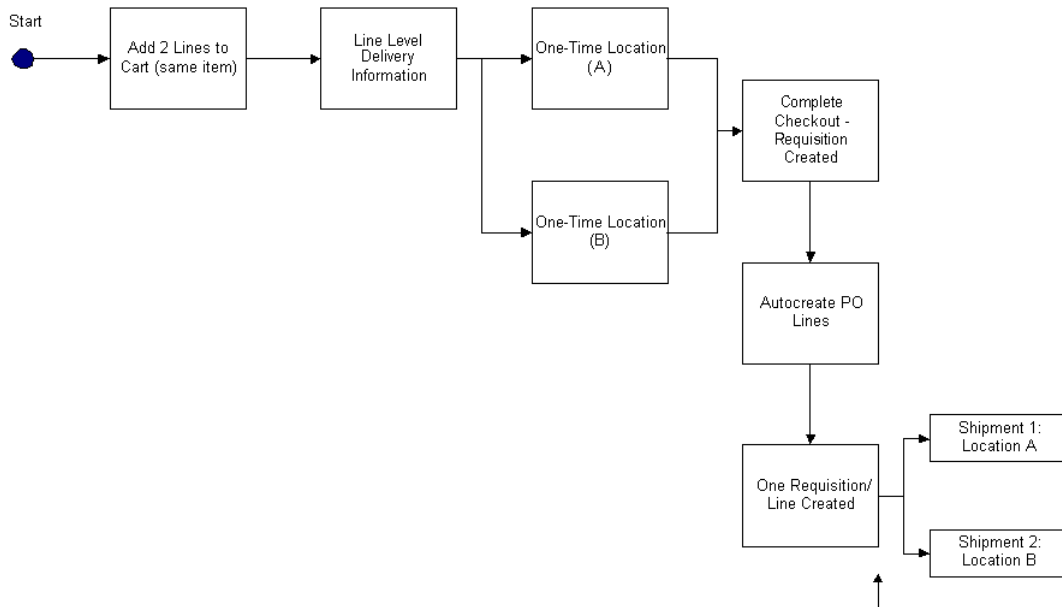
subinventory is set to poplist. If the *item style* is set to text, then no tip is displayed.

- If the requester wants to see the estimated quantity per source subinventory when using the LOV, they must access the LOV and view the results of the query on that page.

### **4.1.7 Purchase Order Grouping for Requisition Lines with One-Time Addresses**

As requisitions are created in Oracle iProcurement, it is possible to assign one-time addresses as the deliver-to locations for each line. One-time locations (delivery addresses) are used when requesters want their items to be delivered to a location that has not been previously defined (and most likely will not be used again). Individual requisition lines can be delivered to distinct and separate one-time locations. Each one-time location is represented on the resulting purchase order line as an attachment.

In the case where the same item is found on two or more requisition lines, each with a separate one-time delivery address, the buyer or requester may not want these two (or more) requisition lines to be grouped onto the same purchase order line as there could be some confusion as to the quantity to be delivered to each location. The figure below details the requisition-to-purchase order process when one-time locations are employed:



As requisition lines are converted into purchase order lines, multiple requisition lines are grouped onto one purchase order line if certain characteristics, such as item and unit of measure are the same. If one-time locations are associated with the requisition lines, each one-time location is represented on the resulting purchase order line as an attachment. The main functional elements of the one-time location grouping functionality are detailed below:

### Grouping Options

- Attributes are in the PO Create Documents Workflow to control the grouping feature, and provide the requester the ability to NOT group requisition lines that contain one-time locations. The workflow looking at the available requisition lines to be converted into purchase order lines and first determines the value of these attributes to determine if requisition lines with the same data will be grouped.
- The two workflow attributes are: Is Grouping of Requisition Line Allowed? and Is Grouping of One Time Address Line Allowed?. Each of these attributes can have a value of Yes or No. Depending on the value selected, the workflow PO Create Documents will behave differently:

- If the attribute Is Grouping of Requisition Line Allowed? is set to No, then no requisition lines are consolidated into a single purchase order line.
- If grouping is set to occur but the second attribute Is Grouping of One Time Address Line Allowed? is set to No, then requisitions with one-time locations will not be grouped.
- If both attributes are set to Yes, then all similar requisition lines, even those with one-time locations will be consolidated onto a single purchase order line. The default values for both attributes is Yes.

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**Notes:**

- When the attribute Group Across Multiple One-Time Locations is set to NO, then no grouping of requisition lines with one-time locations will occur, even if the one-time addresses are the same.
  - The internal names of the above attributes are GROUPING\_ALLOWED\_FLAG and GROUP\_ONE\_ADDR\_LINE\_FLAG respectively.
- 
- 

**Append Quantity and UOM to Attachment**

- As one-time locations are converted and displayed as attachments for the purchase order lines, these text attachments will now include the following information (for one-time location text attachments only):
  - Unit of Measure (UOM)
  - Quantity Ordered
  - Location

As an example, the text of an attachment reads as follows:

Please ship 30 (Each) to:

100 Mason St.  
Palo Alto, CA  
95320

### Setup Steps

1. Access the PO Create Documents Workflow. See [Section 2.9, "Workflow"](#) in the Oracle Applications Setup chapter.
2. Find the new workflow attributes listed above.
3. To modify the grouping logic, change the values of these attributes from Yes to No. Yes is the defaulted value for both attributes. The following table details the results of the various attribute setting combinations:

**Table 4–5 One Time Location Grouping Attributes**

Grouping Attribute Value	One-Time Location Grouping Attribute Value	Result
YES	YES	All similar requisition lines will be grouped regardless of the existence of one-time locations.
YES	NO	Similar requisition lines will be grouped unless a one-time location is found on the requisition line.
NO	YES	No grouping of requisition lines will ever occur.
NO	NO	No grouping of requisition lines will ever occur.

### Profile Options

POR: One Time Location must be set. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

### AK Regions/Attributes

None

### Workflow

The PO Create Documents workflow looks at the two attributes *Is Grouping of Requisition Line Allowed?* and *Is Grouping of One Time Address Line Allowed?* when determining if requisition lines should be grouped onto a single purchase order line.

### Implementation Considerations

- The automatic grouping logic only applies to the workflow PO Create Documents. When creating purchase documents through the Autocreate window, the buyer always has the ability to control the grouping function.
- The profile POR: One Time Location must be properly set in order for one time locations to be used within Oracle iProcurement.
- If the first workflow attribute *Is Grouping of Requisition Line Allowed?* is set to No, then no grouping will occur, regardless of the setting of *Is Grouping of One Time Address Line Allowed?*

## 4.1.8 Employee P-Cards

Employee P-Cards are a way for companies to incorporate electronic payment and settlement procedures to streamline their procure-to-pay processes. Each requester is assigned his/her own employee P-Card to make purchases using Oracle iProcurement.

### Setup Steps:

For detailed information on setting up procurement cards, see the sections on Setting Up Credit Card Programs and Procurement Card Integration in the *Oracle Payables User's Guide*.

In addition to the setup steps provided in the *Oracle Payables User's Guide*, you will need to enable supplier sites to accept procurement cards.

1. Log into Oracle Applications. From the Oracle Purchasing menu, select Supply Base > Suppliers.
2. Query the supplier associated with the supplier site you want to setup.
3. Choose Sites. Query the supplier site for which you want to enable procurement cards.
4. Enable the Procurement Card Site check box to indicate that the supplier site is P-Card enabled.
5. Save the changes.

### Profile Options

The following profile must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Override Supplier P-card

### AK Regions/Attributes

The applicable regions and the associated attributes are:

**Table 4–6 Procurement Card AK Structure**

Region Name	Attribute Name
POR_BILLING_SINGLE_ROW_R	POR_PRMPPT_PCARD_USE FOR_PCARD_ID POR_PCARD_CUSTOMER_CODE POR_PCARD_TYPE
POR_FINAL_REV_CLPSED_R	POR_PCARD_NUM
POR_REV_LINE_DETAIL_R	POR_PCARD_FLAG
POR_VIEW_ORDERS_R	POR_PCARD_NUM
POR_OD_HEADER_R	POR_PCARD_NUM
POR_OD_EXPND_HEADER_R	POR_PCARD_NUM
POR_OD_LINE_DETAIL_R	POR_PCARD_FLAG
POR_POWER_ORDER_INFO_R	POR_PCARD_CUSTOMER_CODE POR_PCARD_ID POR_PCARD_TYPE
POR_POWER_LINE_ITEMS_R	POR_PCARD_FLAG
POR_POWER_SELECTED_LINE_ITEM_R	POR_PCARD_FLAG
POR_SAVED_ORDERS_R	POR_PCARD_NUM

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**Note:** If changes are made to any AK Regions, then the iAS (Apache) server must be bounced for the changes to be reflected in iProcurement.

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### Function Security

None

**Workflow**

None

**Implementation Considerations**

See considerations for Supplier P-Cards.

### 4.1.9 Supplier P-Cards

Supplier P-Cards (or Ghost Cards) are another way for companies to incorporate electronic payment and settlement procedures in order to streamline their procure-to-pay processes. Instead of having to maintain a separate employee P-Card for each requester in the company and each requester having to use his/her own employee P-Card to make purchases, companies can maintain a single supplier P-Card for each supplier/supplier site in the system, and consolidate all purchases from that supplier/supplier site on the single P-Card. The feature allows all requisitions in Oracle iProcurement (across requesters) created against the respective supplier/supplier site to be automatically charged to the single supplier P-Card. To enable the feature, the supplier P-Card must be set-up and tied to the supplier/supplier site in advance. This arrangement improves control on the purchasing process and cuts down on maverick spending.

**Setup Steps:**

There are two major business flows involved in the supplier P-Card functionality used in Oracle iProcurement:

- Supplier P-Card Setup
- Supplier P-Card Assignment For Requisitions.

See the Implementation Considerations section below for a detailed discussion of these setup step since they do not interact with Oracle iProcurement directly. Each of the major flows are set up separately.

**Profile Options**

POR: Override Supplier P-Card must be set. See [Section 2.4, "Profile Options"](#) in the Oracle Applications Setup chapter for complete profile setup instructions.

**AK Regions/Attributes****Table 4-7 P-Card Regions**

Region Name	Attribute Name
POR_REV_LINE_DETAIL_R	POR_PCARD_FLAG
POR_OD_LINE_DETAIL_R	POR_PCARD_FLAG
POR_POWER_LINE_ITEMS_R	POR_PCARD_FLAG
POR_POWER_SELECTED_LINE_ITEM_R	POR_PCARD_FLAG

**Function Security**

None

**Workflow**

None

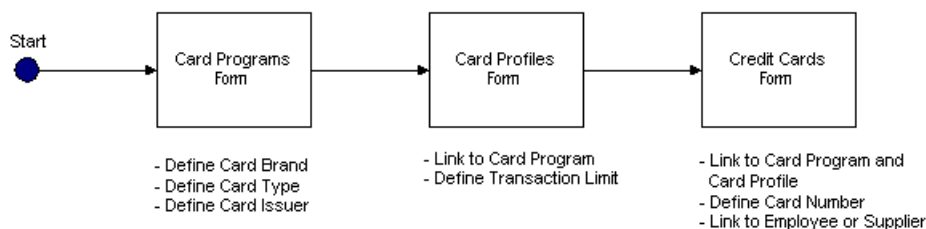
**Implementation Considerations**

- **Supplier P-Card Setup**

To enable supplier P-Cards feature, you first need to enable supplier/supplier sites to accept procurement cards.

1. Log into Oracle Applications. From the Oracle Purchasing menu, select Supply Base > Suppliers.
2. Query for the supplier associated with the supplier site
3. Press the Sites button. Query the supplier site you want to enable procurement cards for.
4. Enable the Procurement Card Site check box to indicate that the supplier site is P-Card enabled.
5. Save the changes.

After the supplier/supplier sites have been enabled for P-Cards, you need to set up supplier P-Cards in the Oracle Accounts Payable application using a process similar to the setup for employee P-Cards. To set up supplier P-Cards, the windows detailed in [Figure 4-2](#) below must be populated.

**Figure 4–2 Setup for Supplier P-Card**

- **Card Program:** This window is used to setup the following information for a P-Card:
  - Card Brand: Card brand name (American Express, Diners, Visa, Mastercard, and so forth).
  - Card type: Select whether the card is of type Procurement or Travel or Supplier. Only P-Cards of type Supplier and Employee can be used in Oracle iProcurement. To set-up a supplier P-Card, you would have to select card type Supplier.
  - Card Issuer/Issuer Site: Select a card issuer/issuer site for the card program. The card issuer/issuer site needs to be an active supplier/supplier site in the system.
- **Card Profiles:** This window is used to associate card profile(s) to the card program. Multiple credit card profiles can be associated with each card program. The profile records any transaction amount limits that are associated with a P-Card. These transaction limits will be passed on to the P-Cards (both employee and supplier) that are created using the profile.

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**Notes: :**

When the P-Card (employee or supplier) associated with the card profile is used for a requisition checkout in Oracle iProcurement, the transaction limit is enforced as follows:

- If the aggregate amount (in functional currency for operating unit) for all line(s) in the requisition checkout, which can be charged to the P-Card is equal to or smaller than the transaction limit defined on the card profile, then the P-Card will be assigned to all the line(s).
  - If the aggregate amount (in functional currency for operating unit) for all line(s) in the requisition checkout which can be charged to the P-Card is greater than the transaction limit defined on the card profile, then the P-Card will not be assigned to any of the line(s).
- 
- 

- **Credit Cards:** This window (shown in [Figure 4-3](#) below) is used to define the P-Card and associate it with a card program and card profile.

Figure 4-3 Credit Cards window

The screenshot shows a software window titled "Credit Cards Maintenance (USD)". The window is divided into several sections:

- Card Program:** ADC Supplier P card Program
- Profile:** ADC Supplier P card Profile
- Card Number:** 45176-78326-60002
- Employee Number:** (Empty field)
- Date of Birth:** (Empty field)
- National Identifier:** (Empty field)
- Maximum Amounts:**
  - Per Transaction: (Empty field)
  - Per Period: (Empty field)
- Supplier Information:**
  - Supplier: Consolidated Inc. (with a "Select All Eligible Sites" button)
  - Supplier Site Information table:

Site	Site Address
NEW YORK OFFICE	111 5th Ave. Suite 3154, New York, NY, 01256
CHICAGO OFFICE	115 Lakeshore Drive, Office Building 1A, Chi
ATLANTA CENTER	970 Main Street, Mall Stop: 117, Adams, Geo

This window can be used to enter the following information:

1. Enter information for the P-Card such as the card number, expiration date etc.
2. Associate the card with the card program and card profile.
3. If the card program selected is of type Procurement, then additional information about the employee who would own the P-Card can be entered on the window.
4. If the card program selected is of type Supplier, then the supplier/supplier site(s), which are to be associated with the supplier P-Card can be entered. The business rules for associating the P-Card to a supplier/supplier site when the card program selected is of type Supplier are as follows:
  - The fields on the window, which are applicable for a card program of type Procurement (Card Member Name, Employee Name, Employee Number etc.) cannot be entered.
  - The supplier and supplier site fields on the window are mandatory i.e. each supplier P-Card must have at least one supplier/supplier site associated with it.

- Each supplier site can only be associated with only a single supplier P-Card.
- A single supplier P-Card can be associated with multiple supplier sites as long as the supplier sites belong to the same supplier. In other words, a single supplier P-Card can be shared by multiple supplier sites as long as the supplier sites belong to the same supplier.
- Supplier sites within a supplier can each be associated with different supplier P-Cards, resulting in a single supplier, which has different supplier P-Cards for each supplier-site.
- The Select All Eligible Sites button on the window provides the requester the capability to enter the multiple supplier sites quickly and easily. Hitting the button will automatically fill up the supplier site fields for the selected supplier with valid but un-assigned (i.e. the site is not assigned to another supplier P-Card) supplier site(s) for the selected supplier.

For additional information about setting up supplier P-Cards, see the *Oracle Payables User's Guide*.

- **Supplier P-Card Assignment for Requisitions**

When requester creates a requisition in Oracle iProcurement, one of the following payment methods can be assigned to each line on the requisition:

- Employee P-Card
- Supplier P-Card
- No P-Card (payment method on invoice)

As the requester is checking out a requisition in Oracle iProcurement, the application checks and determines, which payment method should be assigned to each line on the requisition. The first payment method (employee P-Card) is an option which the requester can explicitly select during the requisition checkout. The other two payment methods (supplier P-Card and no P-Card) are automatically assigned to the requisition line by the application when certain conditions are met (the requester does not have to explicitly select them).

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**Note:** IA requisition in Oracle iProcurement can contain multiple line(s), and depending on the source of the item/service on the line (internal or from external supplier/supplier site), the type of the item (expense or inventory) and other set-up, different payment methods could be applicable for each line. Hence the assignment of the payment method is done at the requisition line-level, and not at the requisition header-level.

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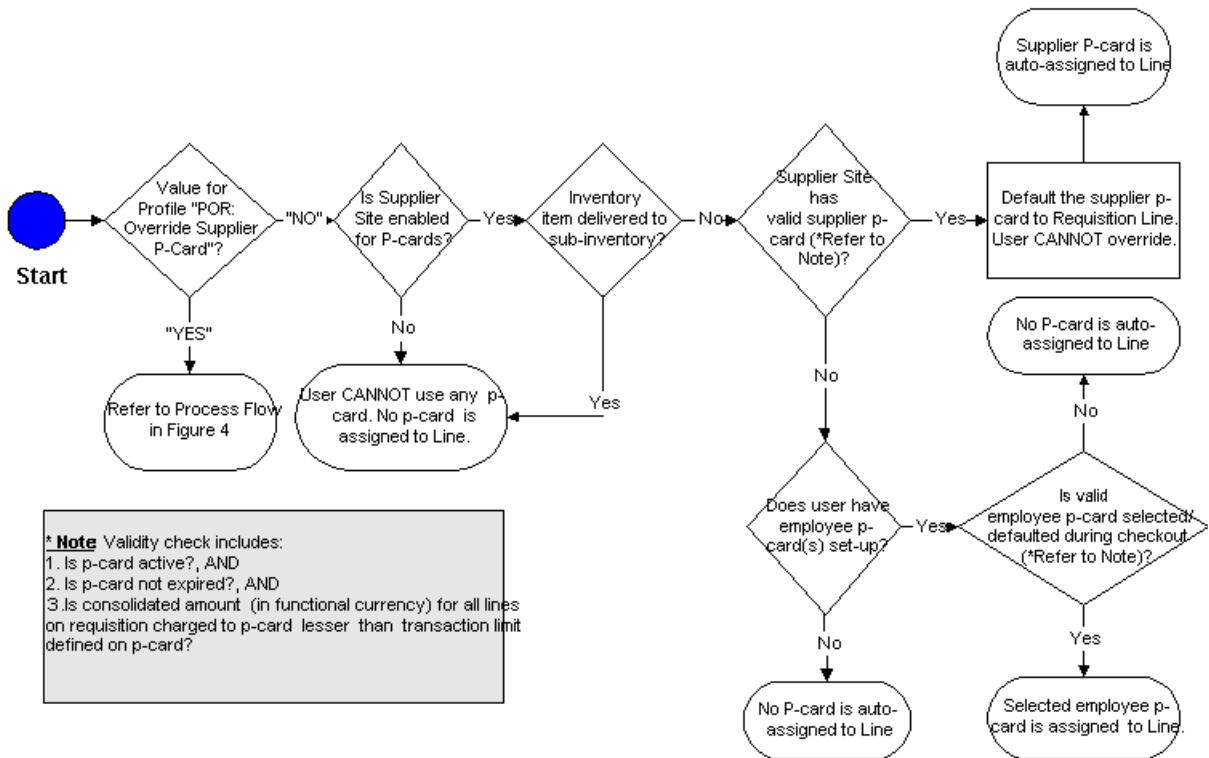
- The following business rules apply for the assignment of payment methods to a requisition line during checkout:
  1. No P-Card (neither employee P-Card nor supplier P-Card) can be assigned to a requisition line in the following cases:
    - No supplier/supplier site available/selected for the requisition line.
    - Item/service on the requisition line is sourced internally.
    - The supplier/supplier site available/selected for the requisition line is not P-Card enabled.
    - No employee P-Card has been set-up for the requester and no supplier P-Card has been set-up for the supplier/supplier site available/selected for the requisition line.
    - The requisition line is associated with a project, in which case a P-Card (employee or supplier) cannot be assigned to the line.
    - For an inventory item being delivered to a sub-inventory, a P-Card (employee or supplier) cannot be assigned to the line. On the other hand, if the inventory item is not delivered to a sub-inventory, then a P-Card (employee or supplier) can be assigned to the line.
  2. If none of the above cases are met, then P-Cards (employee or supplier), if set-up, are eligible to be assigned to the requisition line. Only one of them can be applied, and the Oracle iProcurement application determines which one to apply during the requisition checkout process.

In order to provide maximum flexibility, a system profile controls which P-Card (employee or supplier) gets precedence when both P-Card types are eligible to be applied to the requisition line. The profile is called POR:

Override Supplier P-Card. This profile applies to the Supplier P-card Assignment for Requisitions business flow.

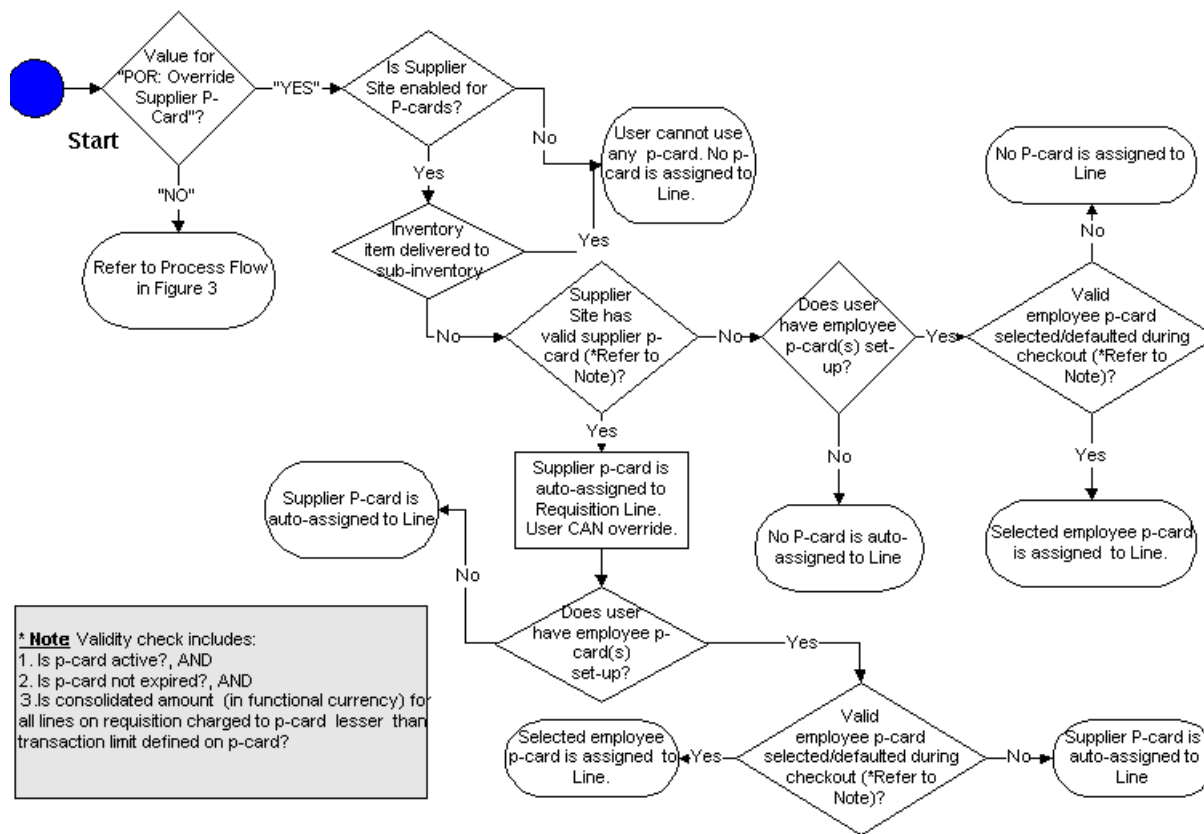
3. If none of the cases mentioned in Rule #1 are applicable and if the POR: Override Supplier P-Card profile value is set to No, the business logic for assignment of P-Cards to a requisition line during a checkout are illustrated in Figure 4-4.

**Figure 4-4 Supplier P-Card Assignment for Profile Set to No**



4. If none of the cases mentioned in Rule #1 are applicable and if the POR: Override Supplier P-Card profile value is set to Yes, the business logic for assignment of P-Cards to a requisition line during a checkout are illustrated in Figure 4-5

Figure 4-5 Supplier P-Card Assignment for Profile Set to Yes



5. After the application has determined the payment method for the requisition line(s) during checkout, the information is made visible to the requester. Access to this information is available on the **Review and Submit** page during checkout, and also on the **Requisition Details** page after the requisition has been submitted. If an employee P-Card has been assigned to at least one line on the requisition, then the partially masked employee P-Card number is displayed in the P-Card Number field at the requisition header level. At the requisition line level, the P-Card Used field will indicate which payment method is assigned to that particular line. The possible values for this field are:
  - Yes when employee P-Card is assigned to the line
  - Supplier P-Card when supplier P-Card is assigned to the line

- No when no P-Card is assigned to the line

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**Notes:**

- Only one employee P-Card can be used per requisition and it may or may not apply to all the lines on the requisition. So the P-Card Number field at the requisition header level contains either a single partially masked employee P-Card number or a blank value.
  - The actual supplier P-Card number is not displayed to the requester (neither in the P-Card Number field at the requisition header level nor in the P-Card Used field the requisition line level). The value of the P-Card Used field at the requisition line level (when it is Supplier P-Card) is the only indication to the requester that a supplier P-Card has been assigned to the line.
- 
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- **Supplier P-Card Carry Over for Requisition to Purchase Orders**

The requisition that is created in Oracle iProcurement is converted into a purchasing document in the Oracle Purchasing application. When all the necessary conditions are met, the resulting purchase order document contains the supplier P-Card number that was associated with the requisition line. Currently there are three processes in the Oracle Purchasing application to convert a requisition into a purchase order:

- Purchase Order Create Document Workflow Engine: Workflow process to automatically create standard purchase orders and blanket releases from approved requisitions
  - Purchase Order Autocreate window: Utility to manually create standard purchase orders and blanket releases from approved requisitions
  - Create Releases Program: Concurrent Program to generate releases for existing blanket purchase agreements from approved requisitions
1. Common Business Rules for All Requisition to Purchase Order Conversion Processes
    - As discussed in the Supplier P-Card Assignment for Requisitions section above, the P-Card Used flag for the requisition lines coming from Oracle iProcurement holds three possible values: Yes, No or Supplier P-Card. This flag determines whether and which P-Card number (employee or supplier

or none) should be applied to the purchase order, which is generated in the Oracle Purchasing application.

- A P-Card (employee or supplier) can be assigned to purchase order documents of type Standard Purchase Order and Blanket Purchase Release only. Only one P-Card number (employee or supplier) can be assigned per purchase order and is applied at the header level of the purchase order only, and, unlike a requisition in Oracle iProcurement, applies to all the lines on the purchase order.

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**Note:** If purchase orders are created directly or are created from requisitions submitted in the Oracle Purchasing application (i.e. there is no associated requisition in Oracle iProcurement), then no P-Card can be assigned to the purchase order, even if the particular supplier/supplier site accepts P-Cards.

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The logic to determine how and which P-Card number (employee or supplier or none) should be applied to the purchase order works as

indicated in [Table 4–8](#) below. This logic applies to all the three requisition to conversion processes.

**Table 4–8 Common P-Card Logic**

Value of 'P-Card Number' for Requisition Header	Value of 'P-Card Used' Flag for Requisition Line(s)	Requisition to Purchase Order Conversion Logic in Oracle Purchasing
1 None	Yes	Scenario NOT possible. If there is no P-Card number at requisition header, all values for P-Card Used flag should either be No or Supplier.
2 None	No	No employee P-Card can be applied to purchase order. For such requisition line(s): <ul style="list-style-type: none"><li>▪ If requisition line(s) have same supplier/supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</li><li>▪ Else, requisition line(s) will be put on different purchase order(s).</li></ul>

**Table 4–8 Common P-Card Logic**

Value of 'P-Card Number' for Requisition Header	Value of 'P-Card Used' Flag for Requisition Line(s)	Requisition to Purchase Order Conversion Logic in Oracle Purchasing
3 None	Supplier	<p>No employee P-Card can be applied to purchase order.</p> <p>Derive supplier P-Card defined for supplier/supplier site:</p> <ul style="list-style-type: none"> <li>▪ If supplier P-Card is valid* (refer to note), maintain supplier P-Card for requisition line(s).</li> <li>▪ If supplier P-Card is invalid, delete supplier P-Card for requisition line(s).</li> </ul> <p>For such requisition line(s):</p> <ul style="list-style-type: none"> <li>▪ If requisition line(s) have same supplier/supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</li> <li>▪ Else, requisition line(s) will be put on different purchase order(s).</li> </ul>
4 Employee P-Card Number	Yes	<p>Employee P-Card from requisition header can be applied to purchase order:</p> <ul style="list-style-type: none"> <li>▪ If employee P-Card is valid* (refer to note), maintain employee P-Card for requisition line(s).</li> <li>▪ If employee P-Card is invalid, delete employee P-Card for requisition line(s).</li> </ul> <p>For such requisition line(s):</p> <ul style="list-style-type: none"> <li>▪ If requisition line(s) have same supplier/supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</li> <li>▪ Else, requisition line(s) will be put on different purchase order(s).</li> </ul>

**Table 4–8 Common P-Card Logic**

Value of 'P-Card Number' for Requisition Header	Value of 'P-Card Used' Flag for Requisition Line(s)	Requisition to Purchase Order Conversion Logic in Oracle Purchasing
5 Employee P-Card Number	No	<p>Do not apply employee P-Card from header level to line(s).</p> <p>For such requisition line(s):</p> <ul style="list-style-type: none"> <li>■ If requisition line(s) have same supplier/supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</li> <li>■ Else, requisition line(s) will be put on different purchase order(s).</li> </ul>

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**\* Note:**

Validity check for employee and supplier P-Cards includes:

- Is card active?, AND
  - Is card not expired?, AND
  - Is Supplier/Supplier Site P-Card enabled?
- 
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**2. Additional Business Rules for Purchase Order Autocreate window**

In addition to the logic discussed in Table 2, when a buyer in Oracle Purchasing converts a requisition into a purchase order using the Purchase Order Autocreate window, the buyer can resolve or change the supplier/supplier site at that time. However, even if the buyer selects a supplier/supplier site, which accepts supplier P-Cards, the P-Card information will be not applied at that time. In other words, only the requisition lines which have P-Card information assigned to them during the requisition checkout in the Oracle iProcurement application can have P-Cards assigned to them in the resulting purchase order.

**3. Business Rules for changing Supplier/Supplier Site on Purchase Order**

Even if there is a P-Card assigned to the purchase order, the buyer has the ability to change the supplier/supplier site on the purchase order. The new supplier/supplier site may not accept P-Cards (employee or supplier) and

it could lead to an error condition. Hence, if a P-Card (employee or supplier) exists on a purchase order, and, if the buyer changes the supplier/supplier site on the purchase order, the application automatically deletes the P-Card number on the purchase order. Before doing so, the application generates an appropriate warning message for the buyer.

- **Purchase Order Communication to Supplier**

Once the purchase order with the assigned supplier P-Card has been created and approved, the supplier P-Card information is sent as a part of the purchase order when it is communicated to the supplier. The information sent is adequate for the supplier to charge the amount on the purchase order to the assigned supplier P-Card. Similar to the existing support for the employee P-Card, the following information for the supplier P-Card is sent as a part of the purchase order:

- P-Card Number
- Card Member Name
- Expiration Date for P-Card
- Credit Card Brand

Also, similar to existing support for employee P-Cards, the supplier P-Card information will be sent as a part of the purchase order only when the purchase order is communicated to the supplier via EDI delivery and XML delivery.

For detailed information on purchase order communication to the supplier using EDI delivery, see the *Oracle e-Commerce Gateway User's Guide*. For detailed information on purchase order communication to the supplier via XML delivery, see the *Oracle XML Gateway User's Guide*.

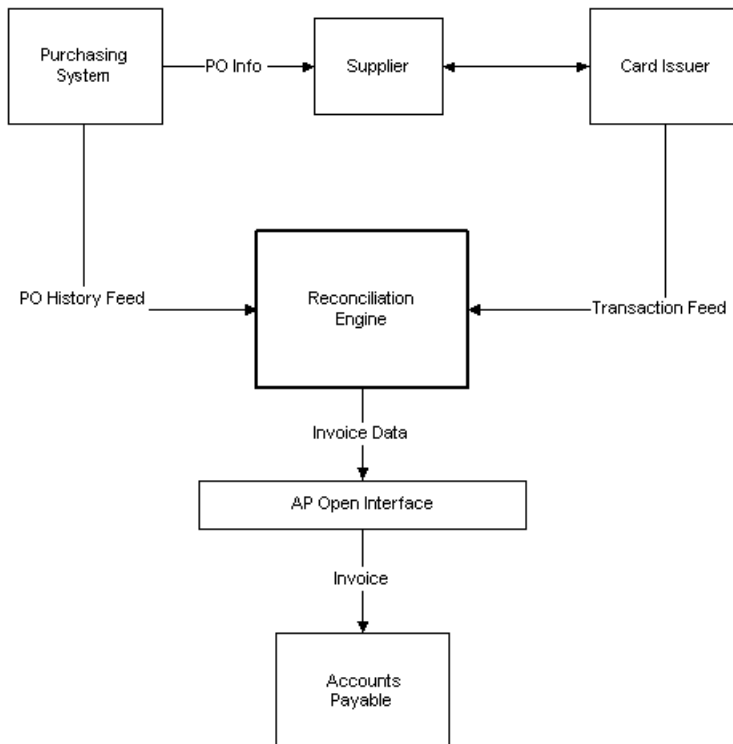
#### **4.1.10 Purchase Order (PO) Extract for P-Card Reconciliation**

The P-Card reconciliation process provides the capability to electronically reconcile the P-Card statements and the corresponding purchase orders in the buyer's purchasing application for both employee and supplier P-Card transactions. The reconciliation engine is typically provided by the card issuer and resides in the buyer's purchasing system. In order to accommodate the reconciliation process, the engine needs a couple of feeds of information:

- Transaction Feed from the P-Card issuer containing charges for the billing cycle
- Purchase Order History feed from the buyer's purchasing system for the billing cycle

This reconciliation is necessary so that the buyer is able to electronically verify that only valid supplier purchase orders are included in the invoice(s) that are paid to the card issuer. After a successful reconciliation between the PO history feed and the transaction feed, the reconciliation engine typically sends the reconciled data files to the Oracle Accounts Payable application (using the Oracle Accounts Payable Open Interface). [Figure 4-6](#) below shows the flow for the P-Card reconciliation process:

**Figure 4-6 P-Card Reconciliation Flow**



Please refer to the documentation provided with the reconciliation engine and the *Oracle Payables User's Guide* for detailed information on this part of the process.

At the end of the P-Card billing cycle, typically, the buying company receives a transaction feed containing an electronic statement for all P-Card purchases made by the buying company. The corresponding purchase order information for the P-Card billing cycle needs to be extracted from the buyer's purchasing application.

The Purchase Order Extract for P-Card Reconciliation feature provides the capability to prepare the purchase order history feed for the reconciliation engine. It is a concurrent report/request, which can be run in the Oracle Purchasing application to generate the feed, called PO History Feed.

For discussion purposes, the feature details are split into 3 sections:

- Concurrent Report
- Criteria for Selection of Purchasing Records
- Format and Data Elements of PO History Feed

### Concurrent Report

The new concurrent report accumulates and compiles the necessary PO history data in a specific format. Upon its completion, the output file is stored in a specified directory location. The following business rules apply to the concurrent request:

1. Name for the concurrent program:
  - Title: Purchase Order History Feed for P-Card Reconciliation
  - Description: Purchase Order History Feed for reconciling P-Card payments
2. The concurrent program belongs to Oracle Purchasing application.
3. The program can be initiated at any time but is typically run before the end of the monthly billing cycle for the P-Card. It can also be set to run at a pre-specified frequency through standard report submission (SRS).
4. The output of the concurrent program will be stored in a specific directory. The directory is derived from the UTL\_FILE\_DIR parameter in the INIT.ORA file of the Oracle Purchasing installation. The application administrator should set-up the output directory location prior to running the concurrent program.
5. The PO History Feed Report Request window has the following parameters which need to be entered prior to the submission of the report:
  - Card Brand Name: List of values containing all available card brand names.
  - Card Issuer/Card Issuer Site: List of values containing all valid Card Issuer/Issuer Sites.

- From Date/From Time: From Date and Time; the `last_update_date` for a purchase order should be later than and including the selected date and time in order for it to be selected.

After the requester has entered a valid Card Brand Name, Card Issuer and Card Issuer Site, the From Date/From Time field on the window gets auto-filled with the To Date and To Time information from the last successfully run report (report with Completed Phase with Normal Status or Complete Phase with Warning Status) for the selected card brand name and card issuer/card issuer site combination. Using this logic reduces the chances of sending duplicate PO History Feeds by running reports with overlapping dates and missing PO records by skipping intermediate dates.

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**Note:** If the last run report for particular card brand name and card issuer/card issuer site combination is not completed successfully (the request is in any phase/status other than *Completed Phase with Normal Status* or *Complete Phase with Warning Status*), then the To Date/Time information for that request is not tracked.

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- To Date/To Time: To Date and Time; the `last_update_date` for a purchase order should be earlier than selected date and time in order for it to be selected.
- Output Filename: The name of the file in which the PO History feed file generated by the report should be stored in the output directory location. If a file with the same filename as the one selected in the Output Filename field already exists in the output directory, then the new file will overwrite the existing file in the output directory.

#### Criteria for Selection of Purchasing Records

Only purchase orders which satisfy certain selection criteria are included in the PO history feed. Some of the selection criteria for the purchase records are entered on the PO History Feed Report Request window (as discussed in the Rules for PO History Feed Report Request window section above), while the rest of the selection criteria are automatically and internally applied by the application. The internal selection criteria are as follows:

- Only purchase orders of type: Standard Purchase Order and Blanket Release are available for selection.

- Only PO's created against supplier/supplier sites, which belong to the same Operating Unit as the requester's responsibility are selected.
- The different values for the Approval Status, Control Status and the On Hold Status for the purchase order in Oracle Purchasing determine whether the purchase orders should be sent as a part of the PO History Feed. The following business rules apply:
  - Only purchase orders with an approval status of *Approved* and *Requires Reapproval* are eligible for selection; purchase orders with any other approval status do not get extracted.
  - Purchase orders with an approval status of *Requires Reapproval* get selected only if they have been approved at least once before they were put in the current approval status of *Requires Reapproval*.
  - Based on a combination of the Approval Status, Control Status and the On Hold Status for the purchase order, the program will generate three possible statuses for the Order Status field for the purchase order included in the PO History Feed:
    - ON: Purchase order is open and should be reconciled with the corresponding transaction feed from the card issuer.
    - HL: Purchase order is temporarily put on hold, but the hold may get released at a later time. However it should not be reconciled with the corresponding transaction feed from the card issuer while it is still in the HL status.
    - CN: Purchase order is permanently canceled and should not be reconciled with the corresponding transaction feed from the card issuer.

Table 4–9 below indicates the selection logic based on the Approval, Control and On Hold statuses of the purchase order in Oracle Purchasing and the appropriate output status for the purchase order in the PO History Feed.

**Table 4–9 Status and Selection Logic**

Approval #	Approval Status	Control Status	On Hold Status	Selection and Status of Purchase Order in PO History Feed
1	Approved	All except Canceled and 'Finally Closed'	Not On Hold	PO is sent with Order Status = ON
2	Approved	All except Canceled and 'Finally Closed'	On Hold	PO is sent with Order Status = HL
3	Approved	Canceled OR Finally Closed'	Does Not Matter	PO is sent with Order Status = CN

**Table 4–9 Status and Selection Logic**

<b>#</b>	<b>Approval Status</b>	<b>Control Status</b>	<b>On Hold Status</b>	<b>Selection and Status of Purchase Order in PO History Feed</b>
4	In Process	Does Not Matter	Does Not Matter	PO is not sent
5	Incomplete	Does Not Matter	Does Not Matter	PO is not sent
6	Pre-approved	Does Not Matter	Does Not Matter	PO is not sent
7	Rejected	Does Not Matter	Does Not Matter	PO is not sent
8	Requires Reapproval1.	All except Canceled and Finally Closed	Does Not Matter	If (PO APPROVED_DATE ≠ NULL), PO is sent with Order Status = HL If (PO APPROVED_DATE = NULL), PO is not sent
9	Requires Reapproval3.	Canceled or Finally Closed	Does Not Matter	If (PO APPROVED_DATE ≠ NULL), PO is sent with Order Status = CN If (PO APPROVED_DATE = NULL), PO is not sent

For complete details of the format and data elements of PO History Feed see the [PO History Feed File](#) appendix of this guide.

### Setup Steps

As mentioned in the section above, the output of the concurrent program will be stored in a specific directory. The directory is derived from the UTL\_FILE\_DIR parameter in the INIT.ORA file of the Oracle Purchasing installation. For additional details about setting the output directory location, refer to the *Oracle e-Commerce Gateway Implementation Manual*.

### Profile Options

None

### AK Regions/Attributes

None

**Function Security**

None

**Workflow**

None

**Implementation Considerations**

None

**4.1.11 Project Accounting Integration**

Integration with Oracle Projects enables requesters to optionally reference project and task related information on shopping cart order lines. The cost of a single requisition line can be distributed across one or more projects.

**Setup Steps**

For detailed information refer to *Oracle Project Accounting User's Guide*.

**Profile Options**

None

**AK Regions/Attributes**

The applicable regions and the associated attributes are:

**Table 4–10 Project Accounting AK Structure**

Region Name	Attribute Name
POR_BILLING_MULTI_ROW_R	POR_EXPENDITURE_ORG_ID
POR_BILLING_SINGLE_ROW_R	POR_EXPENDITURE_ORG_ID
POR_DIST_SUMMARY_R	POR_PROJECT POR_TASK POR_EXPENDITURE_TYPE POR_EXP_ITEM_DATE POR_EXPENDITURE_ORG POR_ATTRIBUTE_1.15

Region Name	Attribute Name
POR_POWER_SINGLE_ROW_R	POR_PRMPT_ADD_PROJECTS POR_EXPENDITURE_ORG_ID

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**Note:** If changes are made to any AK Regions, then iAS must be restarted for the changes to be reflected in iProcurement.

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### Function Security

None

### Implementation Considerations

None

## 4.1.12 Grants Accounting Integration

Oracle Grants Accounting is integrated with Oracle iProcurement to support the charging of requisitions and resulting purchase orders to projects funded by Grants (Awards). The integration introduces the concept of an award number which represents additional information about the source of funding associated with projects and tasks. So, in addition to the standard project and task information, the Award dimension from the Oracle Grants Accounting application can be used to specify the source of funding associated with projects and tasks. This helps organizations manage all aspects of the grant funding they receive. In higher education institutions, other public sector agencies, and project-intensive commercial enterprises it is often necessary to distribute the cost of a purchase request line across multiple projects. To support this need, you can enter multiple projects and awards for each requisition line.

The award number field will be enabled if Grants Accounting has been implemented for the associated operating unit. The Award Number field is only required for Projects that are funded by awards in Grants Accounting.

To enable Grants Integration with Oracle iProcurement, customers will need to apply Financials Family Pack D (Patch 2629235) and Grants Patchset K (Patch 2691082).

## Setup Steps

Oracle Projects must be installed. For detailed information refer to *Oracle Grants Accounting User's Guide*.

## Profile Options

None

## AK Regions/Attributes

The applicable regions and the associated attributes are:

**Table 4-11 Grants Accounting AK Structure**

Region Name	Attribute Name
POR_AWARD_LOV_V	POR_AWARD_NUMBER POR_AWARD_SHORT_NAME POR_AWARD_START_DATE POR_AWARD_END_DATE POR_AWARD_ID
POR_BILLING_MULTI_ROW_R	POR_AWARD_NUMBER POR_AWARD_ID POR_EXPENDITURE_ORG_ID
POR_BILLING_SINGLE_ROW_R	POR_AWARD_NUMBER POR_AWARD_ID POR_EXPENDITURE_ORG_ID
POR_DIST_SUMMARY_R	POR_PROJECT POR_TASK POR_EXPENDITURE_TYPE POR_EXP_ITEM_DATE POR_EXPENDITURE_ORG POR_AWARD_NUMBER POR_ATTRIBUTE_1.15
POR_MY_PROFILE_R	POR_AWARD_NUMBER POR_AWARD_ID

**Table 4–11 Grants Accounting AK Structure**

<b>Region Name</b>	<b>Attribute Name</b>
POR_POWER_SINGLE_ROW_R	POR_AWARD_NUMBER POR_AWARD_ID POR_PRMPT_ADD_PROJECTS POR_EXPENDITURE_ORG_ID

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**Note:** If changes are made to any AK Regions, then iAS must be restarted for the changes to be reflected in iProcurement.

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**Function Security**

None

**Implementation Considerations**

None

## 4.2 Setting Up the Requester Usage Features

This section describes the setup steps required to configure the Oracle iProcurement shopping experience to suit the business needs of your organizations requesters. Included in this section are:

- Shopping
  - [Non-Catalog Requests](#) on page 4-47
  - [Foreign Currency Support](#) on page 4-50
  - [Information Templates](#)
- Delivery
  - [One-Time Address](#) on page 4-55
  - [Hazard Information](#) on page 4-56
- Billing
  - [Estimated Tax Functionality](#) on page 4-58
  - [Favorite Charge Accounts](#) on page 4-62
- Notes
  - [Attachments](#) on page 4-64
- Approval
  - [Global Approver](#) on page 4-65
- Management
  - [Change Requisition](#) on page 4-67
  - [Cancel Requisition](#) on page 4-68
  - [Requester Initiated Changes to Purchase Orders](#) on page 4-69

### 4.2.1 Non-Catalog Requests

Requesters may want to procure an item/service that is not found in the catalog. In such a case, it is possible for you to create a non-catalog request. When requesters cannot find their desired item in the catalog, the **Non-catalog Request** page offers the ability to add an item/service to their shopping cart based on a description of the item or service required. From the **Non-catalog Request** page, requesters can

enter goods billed by quantity, service billed by quantity, or goods or services billed as an amount.

### **Setup Steps:**

Set profiles as described below.

### **Profile Options**

See [Section 2.4, "Profile Options"](#) for complete profile setup instructions. To use each of the possible item types, three profile options must be set:

1. **POR: Goods Line Type**

This profile determines the line type for goods billed by quantity non-catalog orders. The value set here must be distinct from the values set for the other line types (see 2 and 3).

2. **POR: Rate Based Services Line Type**

This profile determines the line type for services billed by quantity non-catalog orders. The value set here must be distinct from the values set for the other line types (see 1 and 3).

3. **POR: Amount Based Services Line Type**

This profile determines the line type for amount-based non-catalog orders. The value set here must be distinct from the values set for the other line types (see 1 and 2).

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**Note:** It is possible to have unit values defaulted onto the non-catalog request page based on the line type. In order to do this, in Oracle Applications, associate a unit of measure to each respective line type.

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### **AK Regions/Attributes**

Through AK Developer, two fields on the Non-Catalog Request page can be configured to be displayed as either drop-down lists or LOVs.

1. **Category:** The category field can be configured to be displayed as either a drop-down list or an LOV. In order to do this the following AK regions must be accessed:
  - **POR\_SPORD\_GOODS\_R**

- POR\_SPORD\_RATE\_R
- POR\_SPORT\_AMOUNT\_R

For each of these regions the item style should be set to Poplist for the attribute POR\_CATEGORY if the category is to be displayed as a drop-down list. The item style should be set to Text for the attribute POR\_CATEGORY if the category is to be displayed as an LOV. By default the category is displayed as an LOV.

2. Unit of Measure: The unit of measure (UOM) field can be configured to be displayed as either a drop-down list or an LOV. This can be accomplished for quantity-based non-catalog requests. These non-catalog requests are associated with the following regions:

- POR\_SPORD\_GOODS\_R
- POR\_SPORD\_RATE\_R

For each of these regions the item style should be set to Poplist for the attribute POR\_UNIT\_OF\_MEASURE if the unit is to be displayed as a drop-down list. The item style should be set to Text for the attribute POR\_UNIT\_OF\_MEASURE if the unit is to be displayed as an LOV. By default the unit of measure is displayed as an LOV.

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**Note:** If changes are made to any AK Regions, then the iAS (Apache) server must be bounced in order for the changes to be reflected in iProcurement.

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## Function Security

None

## Workflow

The PO Create Documents workflow can be configured to automatically source non-catalog requests from a contract. The attribute name that controls this option is *Should non-catalog requests be autosourced from contract?* If set to Yes, then if a valid contract purchase agreement exists for the given supplier and supplier site then a purchase order referencing that contract will be automatically created. The default value for this attribute is No. See [Section 2.9.2, "PO Create Documents"](#) for workflow details.

## Implementation Considerations

None

### 4.2.2 Foreign Currency Support

Each time a user searches for an item in a catalog, the search can display the currency associated with that item. This currency can be any valid currency defined in the application, including the functional currency. Similarly, a non catalog request can be made in any valid currency. Once these items are added to the shopping cart, the application converts the price for that item into the functional currency using the relevant exchange rate and then displays the functional currency throughout the application.

The foreign currency feature provides the ability to display the foreign currency price along with the functional currency price on key screens in the application.

The foreign currency can be displayed on the following pages:

- Shopping Cart Page
- Approver Shopping Cart Page
- Edit Single Account Page (Standard Checkout, Power Checkout and Approver Checkout)
- Edit Multiple Account Page (Standard Checkout, Power Checkout and Approver Checkout)
- Review Charge Accounts (Standard Checkout, Power Checkout and Approver Checkout)
- Enter Delivery Information - Single Line (Standard Checkout)
- Enter Billing Information - Single Line (Standard Checkout)
- Review and Submit Page - Line Details Expanded (All Checkouts)
- Printer-friendly page (All Checkouts)
- Power Checkout Page - All Lines
- Approval Notification
- Approval Notification Reminders
- Requisition Status: View Requisition Details - Line Details Expanded

**Setup Steps:**

Set the profile option.

**Profile Options**

See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Preference - Display Transaction Currency

**AK Regions/Attributes**

The applicable regions and the associated attributes are:

**Table 4–12 Foreign Currency AK Structure**

Region Name	Attribute Name
POR_SHOPPING_CART_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE
POR_POWER_LINE_ITEMS_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE
POR_BILLING_REV_ACCOUNT_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE
POR_SELECTED_LINE_ITEM_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE
POR_REV_LINE_DETAIL_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE

**Table 4–12 Foreign Currency AK Structure**

Region Name	Attribute Name
POR_OD_LINE_DETAIL_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE
POR_PRNTR_FR_LINES_R	POR_CURRENCY_UNIT_PRICE POR_CURRENCY_CODE POR_UNIT_PRICE POR_FUNC_CURRENCY_CODE

In each corresponding AK region, the attributes should be enabled for display by checking the Node Display check box. The display of the check box for Display Foreign Currency Price on the My Profile page is controlled by checking Node Display for the attribute POR\_DISP\_TRANS\_CURRENCY\_FLAG of the POR\_MY\_PROFILE\_R region. This is the master switch for the display of the foreign currency price. If this attribute is on, only then will the user see the check box for the profile on My Profile page and the foreign currency price in the application.

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**Note:** If changes are made to any AK Regions, then iAS must be restarted for the changes to be reflected in iProcurement.

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### Function Security

None

### Workflow

None

### Implementation Considerations

None

## 4.2.3 Information Templates

You may set up information templates to gather additional information in Oracle iProcurement 11i to pass necessary order processing information to suppliers. When an information template is assigned to a category or item, the application

prompts requesters to provide the information specified in the template when the item is added to the shopping cart. This information becomes a line level attachment to the requisition.

For example, you can implement information templates for items like business cards that require additional information (name, address, e-mail, phone) from the requester. Oracle iProcurement will then prompt for name, address, e-mail, and phone number when you order business cards. Each information template must be associated with an Oracle Purchasing item or item category. If an information template is associated with an item category, all items belonging to that category are also associated with the template.

### Setup Steps:

1. Navigate to the Define information Template window. From the Oracle Purchasing menu, select Setup > Information Templates.
2. Enter an Attribute Name and Description. The Attribute Name is the actual field prompt that is displayed in Oracle iProcurement. The window is displayed below:

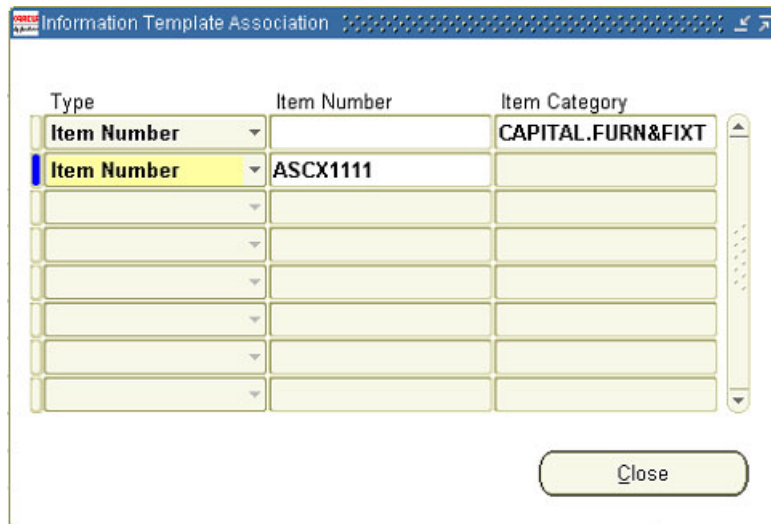
**Figure 4–7 Define information Template Window**

Seq	Attribute Name	Attribute Description	Default Value	LOV	Mandatory	Enabled
1	Color	Surface Color			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Size	Product Size			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Style	Display Style			<input type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

3. Optionally, enter a default value to automatically appear in the field.

4. Indicate whether the field is mandatory for iProcurement requesters. If the field is mandatory, requesters will be prompted to enter a value in the field before proceeding to complete the requisition.
5. Indicate whether to activate the attribute to actually display on iProcurement pages. In certain circumstances, you may want to define an attribute, but delay enabling it for display to iProcurement requesters.
6. Choose Associate Template to associate the template with an item or an item category. The information Template Association window appears. This window is displayed below:

**Figure 4–8 information Template Association Window**



7. Select the type of association (item number or item category) to associate with the template.
8. If you selected Item Number in the previous step, enter the number. If you selected Item Category, enter the category.
9. Save your work.

**Profile Options**

None

**AK Regions/Attributes**

The applicable region and associated attributes are:

POR\_ITEM\_DESC\_R

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**Note:** If changes are made to any AK Regions or information templates, then iAS must be restarted for the changes to be reflected in iProcurement.

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**Function Security**

None

**Implementation Considerations**

If information templates are created for both the item and a category that it belongs to, then both templates apply to that item.

#### 4.2.4 One-Time Address

There are occasions where users want items delivered to a location that is not an office location or other pre-defined location established in the database. This is considered a one time address and can be defined as a deliver to location. This feature enables users to specify a one time address on a requisition line during the checkout process. The one time address can be associated to individual requisition lines or to all requisition lines for a given requisition. One time locations associated with requisition lines will then be displayed as a line-level attachment on the resulting purchase order.

**Setup Steps:**

1. Setup a dummy HR location that would be used as the deliver to location on the requisition line, whenever the user specifies a one time location for that line. When defining this location, it may or may not be associated with an organization. If associated with an organization then a distinct location must be defined for every organization. This location can be set up using the HR location form accessible from the Purchasing menu (Setup -> Organizations -> Locations).
2. Set the value of the profile POR: One Time Location to be equal to the name of the location created in step 1. This profile value can be set at the site, responsibility or user level.

3. By default a single text entry box is provided to enter the address details. Optionally the AK region, POR\_ONE\_TIME\_LOCATION\_R can be configured so that individual address fields can be presented and displayed accordingly.

### **Profile Options**

POR: One Time Location must be set to a location that has been previously defined in the HR Location form.

### **AK Regions/Attributes**

The attribute, POR\_PRMPT\_ONE\_TIME\_LOC represents a prompt that enables the user to enter a one-time location. By default this attribute is set to display. When accessed, the user is brought to a new page which is represented by the new region POR\_ONE\_TIME\_LOCATION\_R. This new region contains a free form text box that allows users to manually enter one-time address information.

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**Note :** If changes are made to any AK Regions, then iAS must be restarted for the changes to be reflected in iProcurement.

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### **Function Security**

Access to this function can be restricted using menu function security. Under Menu Exclusions, exclude the function One Time Location. See [Section 2.6, "Security"](#) on page 2-34 in the Oracle Application Setup chapter for details on function security setup.

### **Workflow**

None

### **Implementation Considerations**

None

## **4.2.5 Hazard Information**

Hazard information can be indicated for each line item of a requisition. As requisitions are created in iProcurement both a hazard identification number and a hazard class can be associated to a requisition line. Further, if an item already has a hazard identification number and/or a hazard class linked to it, this default information will be passed on to the resulting requisition line. The hazard information consists of a hazard id number and a hazard class. This information can

be entered/modified on the line level delivery pages. To display these new fields, new AK attributes must be enabled.

### Setup Steps:

None

### Profile Options

None

### AK Regions/Attributes

The applicable regions and associated attributes are:

**Table 4–13 Hazard Information AK Structure**

Region Name	Attribute Name
POR_DELIVERY_MULTI_ROW_R	POR_UN_NUMBER POR_UN_NUMBER_ID POR_HAZARD_CLASS_NAME POR_HAZARD_CLASS_ID POR_HAZARD_CLASS_2
POR_DELV_INFO_SELECTED_LINE_R	POR_UN_NUMBER POR_UN_NUMBER_ID POR_HAZARD CLASS_NAME POR_HAZARD_CLASS_ID POR_HAZARD_CLASS_2
POR_POWER_SINGLE_ROW_R	POR_UN_NUMBER POR_UN_NUMBER_ID POR_HAZARD_CLASS_NAME POR_HAZARD_CLASS_ID POR_HAZARD_CLASS_2
POR_REV_LINE_DETAIL_R	POR_UN_NUMBER POR_UN_NUMBER_ID POR_HAZARD_CLASS_NAME POR_HAZARD_CLASS_ID

**Table 4–13 Hazard Information AK Structure**

Region Name	Attribute Name
POR_OD_LINE_DETAIL_R	POR_UN_NUMBER POR_UN_NUMBER_ID POR_HAZARD_CLASS_NAME POR_HAZARD_CLASS_ID

By default these attributes are disabled. To enable these attributes, modify the above regions and check the Node Display check box for the new attributes.

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**Note:** If changes are made to any AK Regions, then iAS must be restarted for the changes to be reflected in iProcurement.

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### Function Security

None

### Workflow

None

### Implementation Considerations

None

## 4.2.6 Estimated Tax Functionality

Estimated purchase tax can be calculated for each requisition line created in iProcurement. The estimated tax code and rate can be generated for every requisition line based on a pre-defined setup in Oracle Purchasing.

This setup is based on a hierarchy and the tax can be derived from the item, location, supplier, supplier site, or financial options. This tax hierarchy is found in the Purchasing Options that are defined within Oracle Purchasing. The tax codes/names used in Oracle iProcurement are also defined in Oracle Purchasing. Recovery rates are also supported and the generated tax information can optionally be overridden by the requisitioner. Recovery rates are associated with tax codes/names or through recovery rules. Once again, this is defined in Oracle Purchasing.

Tax summary information is available at the requisition header level. Tax detail information is available at the requisition line level.

**Setup Steps:**

1. Define the tax hierarchy in Purchasing Options. This is accomplished in Oracle Purchasing.  
Purchasing > Setup > Organization > Purchasing Options
2. Create Tax Codes/Names and associate appropriate tax rates. Refer to the *Oracle Payables User's Guide*.
3. Define Tax Recovery rates/rules (optional).
4. Associate the above tax codes/names to:
  - Supplier
  - Supplier Site
  - Ship-to Location
  - Item
  - Financial Options Default

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**Note:** Tax codes cannot be associated with suppliers in a multi-organization implementation. In this case, tax codes can still be associated with supplier sites.

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**Profile Options**

Two profile options will impact the usage of the estimated tax functionality within iProcurement.

- Modifying the tax name that is defaulted during the checkout process is controlled through the profile Tax: Allow Override of Tax Code.
- Modifying the generated recovery rate is controlled through the profile Tax: Allow Override of Tax Recovery Rate.

### AK Regions/Attributes

The applicable regions and the associated attributes are:

**Table 4–14 Estimated Tax AK Structure**

Region Name	Attribute Name
POR_BILLING_SINGLE_ROW_R	POR_TAX_CODE POR_TAX_CODE_ID
POR_BILLING_MULTI_ROW_R	POR_TAX_CODE POR_TAX_CODE_ID
POR_BILLING_LINE_DETAILS_R	POR_TAX_CODE POR_TAX_CODE_ID
POR_POWER_SINGLE_ROW_R	POR_TAX_CODE POR_TAX_CODE_ID
POR_POWER_MULTIPLE_ROW_R	POR_TAX_CODE POR_TAX_CODE_ID

To display the tax code in the above regions, verify that the attribute POR\_TAX\_CODE is set to display (Node Display is checked).

For the recovery rate functionality, the following region and associated attribute can be modified:

**Table 4–15 Recovery Rate AK Structure**

Region Name	Attribute Name
POR_BILLING_CHARGE_ACCOUNT_R	POR_TAX_RECOVERY_RATE

To display the recovery rate information in the above regions, verify that the above attribute is set to display (Node Display is checked).

When viewing requisition details or reviewing the requisition prior to submission, the following AK regions have been modified:

**Table 4–16 Review Tax Information**

Region Name	Attribute Name
POR_FINAL_REV_CLPSED_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT

**Table 4–16 Review Tax Information**

<b>Region Name</b>	<b>Attribute Name</b>
POR_FINAL_REV_EXPND_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT
POR_PRNTR_FR_HEADER_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT
POR_OD_HEADER_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT
POR_OD_EXPND_HEADER_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT
POR_OD_LINES_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT POR_RECOVERABLE_TAX POR_TAX_CODE
POR_OD_LINE_DETAIL_R	POR_ESTIMATED_TAX POR_TAXABLE_STATUS POR_RECOVERABLE_TAX
POR_REV_LINE_DETAIL_R	POR_ESTIMATED_TAX POR_TAXABLE_STATUS POR_RECOVERABLE_TAX POR_TAX_CODE
POR_PRNTR_FR_HEADER_R	POR_NONRECOVERABLE_TAX POR_APPROVAL_AMOUNT
POR_PRNTR_FR_LINES_R	POR_ESTIMATED_TAX POR_TAXABLE_STATUS POR_RECOVERABLE_TAX POR_TAX_CODE

The attributes `POR_ESTIMATED_TAX`, `POR_TAXABLE_STATUS` and `POR_RECOVERABLE_TAX` are displayed at the line level by default. The attributes `POR_NONRECOVERABLE_TAX`, and `POR_APPROVAL_AMOUNT` do not display at the line level or at the header level by default.

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**Note:** If changes are made to the tax hierarchy, applications tax settings, or any AK Regions, then iAS must be restarted in order for the changes to be reflected in iProcurement.

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**Note:** When processing through standard and power checkout, tax code is defaulted for all lines but the tax code from the first requisition line is displayed on the billing page and edit line page respectively. This tax information will not be passed to the other lines of the requisition unless the user specifically makes a change to the tax code. If changes to the tax information are made at the header level, then the new tax information will be passed to each line.

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### **Function Security**

None

### **Workflow**

None

### **Implementation Considerations**

None

## **4.2.7 Favorite Charge Accounts**

The favorite charge accounts functionality provides the requester the capability to maintain a list of up to 10 frequently used charge accounts in **My Profile** page. During the checkout process, the requester can access the favorite charge accounts list and then use it to auto-fill the charge account information for the item(s), rather than having to manually enter the charge account information.

### **Setup Steps:**

1. Log in to Oracle iProcurement Application.
2. Navigate to **My Profile** page using the icons.
3. Enter Favorite Charge Accounts and a nickname for each account. To add another row, choose Add Another Row.

4. Select a default favorite charge account.
5. Save the Changes.

### Profile Options

None

### AK Regions/Attributes

The applicable regions and the associated attributes are:

**Table 4–17 Favorite Charge Account AK Structure**

Region Name	Attribute Name
POR_MY_PROFILE_R	POR_PRMPT_FAV_CHG_ACCT POR_PRMPT_FAV_CHG_ACCT_DEFLT POR_M_CHARGE_AC_REG
POR_BILLING_EDIT_ACCOUNTS_R	POR_PRMPT_ENTER_FAV_ACIN
POR_BILLING_MULT_CHARGE_AC_R	POR_NICKNAME POR_SELECT_RADIO POR_LINE_NUM POR_DELETE_LINE
POR_BILLING_CHARGE_ACCOUNT_R	POR_NICKNAME
POR_BILLING_MULT_ACCOUNTS_R	POR_PRMPT_ENTER_FAV_ACIN

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**Note:** If changes are made to any AK Regions, then the iAS (Apache) server must be bounced in order for the changes to be reflected in iProcurement.

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### Function Security

Function Security exists to disable the Favorite Charge Account List functionality. The function is called Favorite Charge Accounts. See [Section 2.6, "Security"](#) on page 2-34 in the Oracle Application Setup chapter for details on function security setup.

### Implementation Considerations

- The favorite charge account list is the last resort to generate the charge account information for the item. If the Account Generator workflow engine has already

been set-up, the functionality will not affect it (which includes Employee Default Charge Account and the Commodity-based Accounting Rules).

- The requester can add, delete, or modify accounts in the list. A nickname for an account is mandatory, and it has to be unique per list. At least one of the accounts in the list has to be selected as the default.
- The requester can have one favorite charge account list per responsibility. If the requester has multiple responsibilities, they can choose a favorite charge account list per responsibility. The accounts maintained in one responsibility will not be available in the other responsibility and vice-versa. If the requester has responsibilities that roll up to multiple Sets of Books with different accounting structures, the favorite charge accounts list will conform to the respective accounting structures.
- The favorite charge account functionality will not affect the system profile for Dynamic Insertion of Charge Accounts. If the profile has been turned on, requesters still can create new charge accounts on the fly in the **My Profile** page as well as the **Item Checkout** pages.
- A requester can store only valid charge accounts in the favorite charge account list. If a charge account is deactivated in the General Ledger application after the requester has already stored it in the favorite charge account list, an error flag will be automatically raised against that account in the favorite charge account list. The requester then has the opportunity to edit or delete the charge account in the favorite charge account list. Until this error condition has been rectified, the favorite charge account will not appear and therefore cannot be selected in the checkout flows.

## 4.2.8 Attachments

In Oracle iProcurement, requesters can add attachments to a requisition during checkout. Attachments can be:

- Internal to Requisition - the attachment can be viewed only from the requisition.
- To Buyer - the attachment information is passed on to the purchase order created from the requisition.
- To Approver - the attachment information can be viewed by the appropriate approvers.
- To Receiver - the attachment information can be viewed by the receiver, if the receiver is not the requester.

- To Supplier - text and non-image file attachments can be transmitted electronically by EDI or XML to the supplier when the Purchase Order automatically created from the requisition is transmitted.
- Miscellaneous.

**Setup Steps:**

1. Set up the Attachment File Directory profile option to point to the directory where the files for attachments will be stored.
2. Make sure that the directory path specified for this profile option is accessible from the machine where the Web Server is running.

**Profile Options**

The Attachment File Directory profile must be set. See [Section 2.4, "Profile Options"](#) in the Oracle Applications Setup chapter for complete profile setup instructions.

**AK Regions/Attributes**

None

**Function Security**

None

**Workflow**

None

**Implementation Considerations**

None

## 4.2.9 Global Approver

As requisitions are created in iProcurement and approval paths are generated, the list of approvers can be set up to include employees belonging to different business groups. For example, it is possible for requester A from business group 1 to have his or her requisition routed to approver B from business group 2. In addition, approvers from different business groups can be manually inserted into the approval list. As such, the LOV for approvers can include a column containing the business group of each potential approver.

Approvers can view the requisition details from the notifications pages, even if the requisition was created in a different operating unit. Requisitions that were created in a different operating unit will not be available through the general requisition status pages nor will they be available for modification. The approval action history display includes business group information for each approver.

**Setup Steps:**

Set the profile option.

**Profile Options**

HR: Cross Business Groups

**AK Regions/Attributes**

Certain AK regions include the AK attributes which are necessary for global approver support and can be configured using AK Developer:

**Table 4–18 Global Approver AK Structure**

Region Name	Attribute Name
POR_APPROVER_LOV_R	POR_BUSINESS_GROUP

This attribute must have the Node Display checked in order for the business group column to be displayed. By default this attribute will be set to display. To display the business group name of each approver the following region has been modified to include the associated attribute:

**Table 4–19 Global Approver - Display Business Group**

Region Name	Attribute Name
POR_APPROVAL_HIST_R	POR_BUSINESS_GROUP

By default, this attribute will be set to display, however, it will only be displayed if the profile HR: Cross Business Groups is also set to Yes.

To disable these attributes, modify the above regions and uncheck the Node Display check box for the new attributes.

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**Note:** If changes are made to any AK Regions, then iAS must be restarted in order for the changes to be reflected in iProcurement.

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**Function Security**

None

**Workflow**

None

**Implementation Considerations**

None

**4.2.10 Change Requisition**

A requester in Oracle iProcurement can change a requisition after it has been submitted. The requisition can be changed at any time prior to its conversion to a purchase order, even though it currently is in an approver's To Do Notifications list. When the requisition is in the change process, it will be removed from the current approvers notification list.

**Setup Steps:**

None

**Profile Options**

None

**AK Regions/Attributes**

None

**Function Security**

Requisition Withdrawal is controlled by the function View My Reqs Withdraw. See [Section 2.6, "Security"](#) on page 2-34 in the Oracle Application Setup chapter for details on function security setup.

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**Note:** When choosing Change, the requester will be taken to a new page that will ask if they want to change the requisition and add it to their shopping cart so that changes can be made. Alternatively, the requester may decide that the goods on the requisition are not needed and will cancel it.

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### **Workflow**

PO Create Documents workflow impacts this feature. If it is running in background mode there is potentially a longer window of opportunity for requesters to make changes.

### **Implementation Considerations**

- The change feature was formerly known as Requisition Withdrawal and the Withdraw button has been replaced by the Change button.
- There is a single Change button which depending on the status of the requisition will either launch the requester into the following flows:
  - a. Requester Change Order Request flow (when at least one line is placed on a purchase order). For the lines placed on a purchase order, you can request changes, which will have to be approved by the buyer on the purchase order. For lines, which are not placed on the purchase order, the requester can directly change the line.
  - b. Change Requisition flow (when no lines are placed on a purchase order). The requester can directly change the entire requisition or select and change individual lines on the requisition.

## **4.2.11 Cancel Requisition**

The feature provides the Oracle iProcurement user the capability to select and cancel individual requisition lines (in addition to the entire requisition), before they are placed on a purchase order or a sales order.

### **Setup Steps:**

Enabling the function security for a requester (see list below) enables them to select and cancel individual lines (including all lines on the requisition, which would be equivalent to canceling the entire requisition).

### **Profile Options**

None

### **AK Regions/Attributes**

None

### Function Security

The ability to cancel requisitions is controlled by functions View my Reqs Cancel, View All Reqs Cancel, and View My Group's Reqs Cancel.

See [Section 2.6, "Security"](#) on page 2-34 in the Oracle Application Setup chapter for details on function security setup.

### Workflow

None

### Implementation Considerations

- There is a single Cancel button which depending on the status of the requisition will either launch the requester into the following flows:
  - a. Requester Cancel Order Request flow (when at least one line is placed on a purchase order). For the lines placed on a purchase order, you can request cancellations, which will have to be approved by the buyer on the purchase order. For lines, which are not placed on the purchase order, the requester can directly cancel the line.
  - b. Cancel Requisition flow (when no lines are placed on a purchase order). The requester can directly cancel the entire requisition or select and cancel individual lines on the requisition.
- You cannot cancel internal requisition lines after they have been linked to an internal sales order.

## 4.2.12 Requester Initiated Changes to Purchase Orders

Requester-initiated amendments to purchase orders can often be time-consuming and labor-intensive. Oracle iProcurement supports a streamlined and self-service process for making amendments. Requesters can request line cancellations, changes to the order quantity or amount, need by date, and under some conditions, price. This capability complements the Requisition Change feature. Once submitted and approved, the Purchasing organization retains appropriate controls and can accept or reject proposed changes. As expected, material changes to the Purchase Order result in both a new revision and immediate supplier notification.

This feature provides the Oracle iProcurement requester the ability to request attribute changes and line cancellations to purchase orders that have been created to purchase the items requested by the user in a requisition. The following attributes on the purchase order lines are available for changes:

- Need-by Date
- Quantity Ordered
- Price for Non-Catalog Request Items
- Cancel Purchase Order Line

The buyer for the requester's purchase order needs to accept the change request, after which the values on both the purchase order and the requisition is updated. Before the change request is sent to the buyer on the purchase order for processing, the change request may have to be approved by the Oracle iProcurement requester's approval hierarchy. There is a workflow package, which can be customized to include the business rules under which the change request needs to be manually approved by the Oracle iProcurement requester's approval hierarchy. Otherwise the change request will be automatically approved and be sent to the buyer on the purchase order. The buyer on the purchase order can approve or reject the change request using either a notification or using a self-service screen which can be accessed from the Pending Purchase Order Changes menu in the Oracle Purchasing application. The Oracle iProcurement requester can track the progress of the change request using the **Change History** page.

### **Setup Steps**

Whenever the requester initiates a purchase order change order request, the change order request document gets routed through the Oracle iProcurement user's approval hierarchy. Since the requisition document has already been through the approval hierarchy at least once before some customers would not want the change order request to be the re-routed through the approval process and others would. The PO Change Request Tolerance Check workflow package provides the administrator the ability to control which changes to the attributes in the order request require manual re-approval and which would not need require manual re-approval and would get automatically re-approved.

As mentioned above, the following attributes in a requisition can be impacted as a result of a change request initiated by the requester:

1. Quantity ordered at a requisition line level.
2. Unit price at a requisition line level.
3. Requisition total amount at a requisition header level.
4. Need-by date at a requisition line level.

Using the workflow package, the administrator can define an Upper Tolerance limit and a Lower Tolerance limit for all these attributes. If the attribute change requested

by the Oracle iProcurement user lies within the Upper Tolerance limit and a Lower tolerance limit, then the change request does not require a manual re-approval from the Oracle iProcurement requester's approval hierarchy. If the attribute change requested by the Oracle iProcurement user is greater than the Upper Tolerance limit or lesser than the Lower Tolerance limit for the attribute, then the change request requires a manual re-approval from the Oracle iProcurement user's approval hierarchy.

For each of these attributes, seeded values are available for the Upper Tolerance Limit and Lower Tolerance Limit. The administrator can change these values to suit their business requirements.

### **Profile Options**

None

### **AK Regions/Attributes**

None

### **Function Security**

This feature is controlled by functions View my Reqs Change Order and View Reqs Change Order History. See [Section 2.6, "Security"](#) on page 2-34 in the Oracle Application Setup chapter for details on function security setup.

### **Workflow**

PO Change Request Tolerance Check

See Setup Steps above for more specific details.

### **Implementation Considerations**

- There is a single Change button which depending on the status of the requisition will either launch the requester into the following flows:
  - a. Requester Change Order Request flow (when at least one line is placed on a purchase order). For the lines placed on a purchase order, you can request changes, which will have to be approved by the buyer on the purchase order. For lines, which are not placed on the purchase order, the requester can directly change the line.
  - b. Change Requisition flow (when no lines are placed on a purchase order). The requester can directly change the entire requisition or select and change individual lines on the requisition.

- At any given time, there can be only a single change request pending per requisition. Until the pending change request is completely acted upon, the requisitioner cannot request any new purchase order (PO) change requests for the requisition.
- Only the preparer of the requisition can request purchase order change requests for the requisition.
- If a purchase order line contains multiple distributions corresponding to the different requisitions, then the purchase order line is not eligible for change request and none of the Oracle iProcurement requesters who prepared the requisitions can request changes to the purchase order.
- If the purchase order has any approval status other than *Approved*, then the purchase order is not eligible for a change request and none of the Oracle iProcurement requesters who prepared the requisitions associated with the purchase order can request changes to the purchase order.
- If the purchase order has any control status other than *Closed for Receiving* or *Closed for Invoicing*, then the purchase order is not eligible for a change request and none of the Oracle iProcurement user who prepared the requisitions associated with the purchase order can request changes to the purchase order.
- If the purchase order shipment has a control status other than *Closed for Receiving* or *Closed for Invoicing*, then the purchase order shipment is not eligible for a change request and none of the Oracle iProcurement user who prepared the requisition lines associated with the purchase order shipment can request changes to the purchase order shipment.
- Price changes for Non Catalog Request Items are not allowed to Partially Invoiced, Received and Accrue on Receipt purchase orders.
- When the purchase order line contains a Non-Catalog Request item in a foreign currency, the Oracle iProcurement user can request a price change for that item in both the foreign currency of the item as well as the functional currency for the operating unit. In case of price change request in the foreign currency of the item, the conversion rate used for the change request is the same as the one used at the time of purchase order creation.
- While the purchase order change request is being approved in the Oracle iProcurement user's approval hierarchy, if the PO becomes ineligible for change (purchase order goes into a *Cancelled* control status), then the PO change request is automatically rejected. The buyer does not receive the notification to process the change request, nor does the change request appear in the buyer self-service screen.

- After the purchase order change request has been approved in the Oracle iProcurement user's approval hierarchy and before the request is sent to the buyer on the purchase order for processing, a check is made to compare the requested values for the attributes on the change request and the current values on the PO. If these values are same, then the purchase order change request is automatically accepted. The buyer does not receive the notification to approve the change request, nor will the request appear in the buyer self-service screen.
- While the purchase order change request is being approved in the Oracle iProcurement user's approval hierarchy, if the purchase order goes into an *In Process* approval status or a *Requires Re-approval* status, then the purchase order change request is deferred and is not sent to the buyer until the purchase order is in the *Approved* status.
- Encumbrance (if enabled) support is available for the change request. When the requester is creating the purchase order change request in Oracle iProcurement, the encumbrance funds check is performed for the revised requisition document total if there is an increase in the document total. The actual funds reservation is performed after the buyer responds to the purchase order change request.
- Tax support is available for the change request. While submitting the change request, the estimated tax applicable to the requisition is recomputed based on the revised requisition document total.
- If there are price breaks applicable to the purchase order based on the changes requested by the requester, those are applied to the purchase order.



This section discusses the implementation of features associated with the receiving features of Oracle iProcurement 11*i*. The central desktop for receiving in Oracle iProcurement is the **Receiving** home page. From this page you can view items to be received and recently created receipts in chronological order. You can select the following receiving features:

- [Receive](#) on page 5-2
- [Return](#) on page 5-12
- [Correct](#) on page 5-13
- [View Receipts](#) on page 5-14
- [Confirm Receipt Notifications](#) on page 5-15

## 5.1 Receive

This section discusses the implementation steps for usage of the Oracle iProcurement desktop receive functionality. It includes:

- Receipt Creation
- Express Receipts
- Blind Receipts
- Receiving Against Intransit Shipments
- Requisitions to Receive

### 5.1.1 Receipt Creation

A requester can create receipts against orders in Oracle iProcurement. For an order to appear in the receiving module it must have a receipt routing of Direct Delivery (you cannot create receipts against orders with a receipt routing of Standard or Inspection). Destination types of Expense, Inventory, and Outside Processing are supported. Once a requester has selected one or more lines from an order to receive; they can enter Waybill, Packing Slip and Comment information. After submitting a receipt a receipt confirmation number is shown for reference purposes.

#### **Setup Steps**

None

#### **Profile Options**

None

#### **AK Regions/Attributes**

None

#### **Function Security**

Access to the receiving feature is excluded through the function POR: Receive Orders. With the setting of this function security, the Receiving home page and all of its links are excluded from the requester's desktop.

The All Items to Receive function security is used to exclude a requester from creating receipts against any requisition line for which they are not the original requester. In the case where there is no requester and they are not the buyer, then

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they are excluded from this line. See [Section 2.6, "Security"](#) in the Oracle Applications Setup chapter for details on security.

**Workflow**

None

**Implementation Considerations**

No additional

## 5.1.2 Express Receiving

Using the Express Receive functionality in receiving reduces the number of receipt pages from three to one. After entering a receipt quantity the requester clicks "Express Receive" to directly receive a receipt number. The packing slip, waybill, and receipt comments fields are bypassed as well as the **Receive Items: Review and Submit** page

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**Note:** If you are also going to use blind receiving, [Section 5.1.3, "Blind Receiving"](#) for details of the interaction of the express receiving and blind receiving features.

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**Setup Steps**

None

**Profile Options**

The following profile must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Support Review for Express Receive

**AK Regions/Attributes**

None

**Function Security**

Access to the Express Receiving functionality can be restricted through excluding the function Express Receive. See [Part 2.6, "Security"](#) in the Oracle Applications Setup chapter for details on security.

**Workflow**

None

**Implementation Considerations**

No additional

**5.1.3 Blind Receiving**

Many enterprises would like to enforce a blind receiving process for their employees (especially in the case of direct goods in a manufacturing environment). With blind receiving a requester creating a receipt is not given visibility of the quantity ordered, quantity already received, or the default receipt quantity. This forces the person creating the receipt to count the number of items received and then enter the receipt quantity into the Quantity Received field. The receiving date and receiving quantity tolerances are ignored when Blind Receiving is enabled.

**Setup Steps**

In the Receiving Options window in Oracle Purchasing, the Allow Blind Receiving checkbox must be selected for Blind Receiving functionality to be enabled in Oracle iProcurement.

**Profile Options**

The following profile must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Enable Blind Receiving

**AK Regions/Attributes**

None

**Function Security**

The setting of the Express Receive function security will have a receiving impact when Blind Receiving is enabled. For more information refer to [Table 5-1, "Behavior of Express Receive and Blind Receiving functionality"](#). See [Section 2.6, "Security"](#) in the Oracle Applications Setup chapter for details on security.

**Workflow**

None

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### Implementation Considerations

- With the POR: Enable Blind Receiving profile set to Yes, the behavior for the **Receive Items: Select Items to Receive** page will be as follows:
  - Receipt Quantity fields to be received are not defaulted with the quantity available.
  - Quantity Received column do not appear.
  - Quantity Ordered column do not appear.
  - Tolerances (if set-up) for the Receipt Date and Receipt Quantity is ignored.
- With the POR: Enable Blind Receiving profile set to No, the behavior for the **Receive Items: Select Items to Receive** page is as follows:
  - Receipt Quantity fields are defaulted with the quantity available to be received.
  - Quantity Received column appears.
  - Quantity Ordered column appears.
  - Tolerances (if set up) for the Receipt Date and Receipt Quantity are enforced.
- Impact of Express Receive function security setting and the POR: Enable Blind Receiving profile:
  - The display of the Express Receive (or Receive) column in the Requisitions to Receive portlet and the Express Receive (or Receive) button on the My Requisitions to Receive - Full List page depends on the values for the following settings for the requester:
    - Express Receive functional security setting.
    - Value of the POR: Enable Blind Receiving profile.

The table below summarizes the behavior for the two pages depending the combination of the Express Receive functional security and the POR: Enable Blind Receiving profile.

**Table 5–1 Behavior of Express Receive and Blind Receiving functionality**

Setup	Express Receive functional security	POR: Enable Blind Receiving profile	Can requester Express Receive Requisitions from Requisitions to Receive portlet AND Requisitions to Receive-Full List?	Can requester Express Receive from Receive Items: Select Items to Receive page?
1	Enabled	No	Yes	Yes
2	Enabled	Yes	No	Yes
3	Disabled	No	No	No
4	Disabled	Yes	No	No

## 5.1.4 Receiving Against Intransit Shipments

Intransit shipments are defined as a shipment of items from one inventory organization or supplier to a destination inventory warehouse. The goods associated with an advance shipping notice (ASN) may not yet have arrived at the destination warehouse. Intransit shipments fall into the following three categories:

- ASN shipments sent by a supplier to a customer.
- Inter-organization transfers that are created through internal requisitions. These intransit shipments also involve the transfer of inventory items from one inventory organization to another.
- Manually created intransit shipments that are processed in the Oracle Inventory module. These intransit shipments involve the transfer of inventory items from one inventory organization to another and are not supported in Oracle iProcurement receiving.

If there is an intransit shipment associated with the shipped item, then the shipment details can be viewed by the requester while receiving the item. The **Shipment Details** page includes detailed shipment information such as Expected Receipt Date, Quantity Shipped, and Freight Terms. If multiple shipments are associated to the shipped item, then the details for all the associated shipment can be viewed.

### Set Up Steps

None

## Profile Options

The following profiles must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Select Internal Requisition for Confirm Receipts

POR: Select Inventory Replenishment Lines for Confirm Receipts

## AK Regions/Attributes

None

## Function Security

None

## Workflow

The confirm receipts notification workflow selects internal requisitions that have a need-by-date that is prior to the date of when Confirm Receipts Workflow request is submitted. See [Section 5.5, "Confirm Receipt Notifications"](#) for more details.

## Implementation Considerations

When receiving against a combination of multiple intransit and purchase order shipments, multiple receipts are created when required. The criteria that determines the creation of a new receipt are listed below:

- A separate receipt should be created for each supplier/inventory organization combination.
- All shipments from an ASN should always be received on the same receipt, even if the receiving is completed via multiple partial transactions. This is true even if the ASN consists of shipments from multiple purchase orders. A new receipt against the purchase order distribution should be created for any quantity that exceeds the quantity shipped on the ASN shipment.
- All shipments from an internal requisition must be received on the same receipt.

### 5.1.4.1 Receiving Against Internal Requisitions

Internal requisitions (internal orders) can be received in Oracle iProcurement. Once the associated internal sales order has been picked, packed, and shipped (confirmed), the items are recorded as received in Oracle iProcurement. As with all requisitions, only those internal requisitions with a receipt routing (defined in the

shipping network) of direct delivery can be received. The following restrictions exist for receiving against internal requisitions:

- Internal orders can not be over-received.
- Internal orders can not be returned.
- Corrections cannot be created against internal orders that are greater than the order amount.
- Internal orders delivered to an inventory destination can not be corrected. Corrections can only be created against expense destinations.

You can confirm receipts for an internal order. A notification will be sent to the requester of the internal requisition. See *Confirm Receipt Notifications* topic for more details.

### Setup Steps

1. Verify that the shipping network is defined with the transfer type set to Intransit. If the transfer type is not set to Intransit, then the requested items will be automatically received into the destination organization upon shipment from the source organization.
2. Verify that the shipping network is defined with the receipt routing set to Direct Delivery. Direct Delivery must be defined in order for receipts to be recorded in iProcurement.
3. If the original requisition is being delivered to an inventory destination, verify that the destination subinventory is indicated.

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#### Notes:

- Once the items have been shipped, the shipment number is displayed for all internal requisitions.
  - It is possible to receive against internal requisitions destined for either inventory or expense locations as long as the receipt routing is defined as Direct Delivery.
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### Profile Options

None

**AK Regions/Attributes**

None

**Function Security**

None

**Workflow**

None

**Implementation Considerations**

No additional

**5.1.5 Requisitions to Receive**

Requesters have the ability to create one-click receipts for their requisitions directly from the **Receiving** home page. This is especially helpful in case of desktop receiving of indirect items such as office supplies. The **My Requisitions To Receive** portlet on the **Receiving** home page enables a receipt to be created directly against all eligible distributions on a requisition.

**Figure 5–1 Requisitions to Receive**

## Requisitions to Receive

Click **Express Receive** to directly create receipt(s) with the receipt values automatically defaulted. [i](#)

Full List

Requisition	Requisition Description	Supplier	Order	Express Receive
<a href="#">5000</a>	Dell PC Pentium 3 with Monitor	BestBuy	10000	<input checked="" type="checkbox"/>
<a href="#">5010</a>	Sony Playstation 2 with Console	RadioShack	Multiple	<input checked="" type="checkbox"/>
<a href="#">5020</a>	Toshiba ASX100 DVD Player	GoodGuys	10067	<input checked="" type="checkbox"/>
<a href="#">5030</a>	Nintendo SX11 Game Console	Multiple	Multiple	<input checked="" type="checkbox"/>
<a href="#">5040</a>	Matrix II DVD	Multiple	12457	<input checked="" type="checkbox"/>

### Setup Steps

None

### Profile Options

None

### AK Regions/Attributes

None

### Function Security

POR\_ALL\_ITEMS\_TO\_RECEIVE

### Workflow

None

### Implementation Considerations

- Criteria for displaying purchase order-related requisitions in Requisitions to Receive portlet:
  - When the POR\_ALL\_ITEMS\_TO\_RECEIVE functional security for the requester is enabled, all requisitions are eligible to be shown in the portlet. In the case where the POR\_ALL\_ITEMS\_TO\_RECEIVE functional security

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is disabled for the requester, only requisitions which have at least 1 line with the requester as the preparer are eligible to be shown in the portlet.

- Only requisitions which have at least one line placed on purchase order, which meets the following criteria are eligible to be shown in the portlet:
  - The purchase order approval status is *Approved*.
  - The quantity ordered less the quantity delivered less the quantity cancelled is greater than zero.
  - The Shipment Type is one of *Standard*, *Blanket*, or *Scheduled*.
  - The Receipt Routing for the Purchase Order must be set to *Direct Delivery*.
- If a purchase order was created without creating a requisition and the purchase order meets both the criteria mentioned above, the portlet will not contain such a case.
- The five most recently created requisitions, which meet the above criteria are shown in the portlet. The requisitions will be sorted descending by requisition number.
- The Full List button on the portlet will take the user to the entire list of requisitions which satisfy the criteria mentioned above.
- Criteria for displaying internal requisition order-related requisitions in Requisitions to Receive portlet:
  - Only internal requisitions which have at least one line placed on an internal sales order, which meet the following criteria are eligible to be shown in the portlet:
    - The quantity ordered less the quantity delivered less the quantity cancelled is greater than zero.
    - A valid shipping network has been set up.
  - The Receipt Routing for the internal sales order should be set to *Direct Delivery*.
  - The Need-By Date on the internal requisition is not later than the system date when the receipt is being created.
  - The Source Type Code is set to *Inventory*.

## 5.2 Return

This feature enables you to return items to the supplier after you have received them. Returning items can be accomplished by clicking the appropriate link from the **Receiving** home page. Received Items are displayed and you can enter a quantity in the Return Quantity field. In addition, a reason for a return, a return material authorization number, and comments can be added to any item that is being returned. This additional information is optional. Returning items will add a transaction to the receiving history for that requisition. The new adjusted value will be visible when the requester queries the order in the view receipts section of Oracle iProcurement.

### Setup Steps

None

### Profile Options

None

### AK Regions/Attributes

The AK regions for returns are:

POR\_RTV\_RECEIPTS\_R  
POR\_RTV\_RECEIPTS\_THIS WEEK\_R  
POR\_RTV\_REVIEWS\_R  
POR\_RTV\_EDIT\_LINES\_R  
POR\_RTV\_TXN\_INFO\_R

### Function Security

By excluding the Return Items function, requesters are excluded from creating returns against all receipts. Excluding the Return All Items function will prevent requesters from creating returns against items they did not request. See [Section 2.6, "Security"](#) in the Oracle Applications Setup chapter.

### Workflow

None

### Implementation Considerations

No additional

## 5.2.1 Debit Memos for Return Transactions

When the Oracle iProcurement requester is creating a return transaction against the supplier this feature automatically creates a debit memo in the Oracle Payables application against a supplier invoice.

### Setup Steps

The supplier site should be enabled for debit memo creation. To enable the supplier site, the Create Debit Memo from RTS transaction flag needs to be selected in the Supplier Site window in the Oracle Purchasing application. If the flag is enabled, every time the Oracle iProcurement requester creates a return transaction against that supplier site, a debit memo will be created against the supplier invoice (if the supplier invoice exists).

### Profile Options

The following profile must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Enable Automatic Debit Memo Creation for Returns

### AK Regions/Attributes

None

### Function Security

By excluding the Return Items function, requesters are excluded from creating returns against all receipts. Excluding the Return All Items function will prevent requesters from creating returns against items they did not request. See [Section 2.6, "Security"](#) in the Oracle Applications Setup chapter.

### Workflow

None

### Implementation Considerations

No additional

## 5.3 Correct

There are occasions when requesters want to make modifications to an existing receipt quantity. Normally this is the result of human error when the wrong receipt

quantity was originally entered. From the **Receiving** home page requesters can select "Correct Items" and proceed to correct an existing receipt. It is also possible to correct the quantity of items that someone else has received.

### **Setup Steps**

None

### **Profile Options**

None

### **AK Regions/Attributes**

None

### **Function Security**

By excluding the Correct Receipts function requesters cannot create corrections against any receipts. Excluding the Correct All Receipt function will prevent a requester from creating corrections against receipts for any requisition lines on which they are not the original requester. See [Section 2.6, "Security"](#) in the Oracle Applications Setup chapter.

### **Workflow**

None

### **Implementation Considerations**

No additional

## **5.4 View Receipts**

This feature enables you to view all the relevant receiving transactions for your requisitions as well as receipts processed by someone else.

### **Setup Steps**

None

### **Profile Options**

None

**AK Regions/Attributes**

None

**Function Security**

Access to the Receiving History functionality can be restricted by excluding the function View Receipts. Access to the viewing receipts created by others can be disabled by excluding the function View All Receipts. See [Section 2.6, "Security"](#) in the Oracle Applications Setup chapter.

**Workflow**

None

**Implementation Considerations**

No additional

## 5.5 Confirm Receipt Notifications

It is possible to have notifications sent to the requester of items in order for them to respond to the receipt status of an order. These notifications are called confirm receipt notifications. The options available to the requester who receives a notification are *Fully Received*, *Not Received*, *Partially/Over Received* and *Reassign*. The line on the order must be set to a matching level of either 3 Way or 4 Way Matching. Some amount of time must have lapsed from the need-by-date found on the order line. (The standard amount of time is 1 day after the need-by-date although this can be modified in the workflow engine). The process Confirm Receipts Workflow Select Orders must be submitted in order for the notifications to be sent to the requesters

**Setup Steps**

1. Set profile options.
2. Run Confirm Receipts Notification workflow.

**Profile Options**

The following profiles must be evaluated when implementing this feature. See [Section 2.4, "Profile Options"](#) for complete profile setup instructions.

POR: Select Internal Requisition for Confirm Receipt

POR: Select Inventory Replenishment Lines for Confirm Receipts

### **AK Regions/Attributes**

Not Applicable

### **Function Security**

Not Applicable

### **Workflow**

The workflow is called Confirm Receipt Workflow and its system name is PORCPTWF.

### **Implementation Considerations**

- If the profile option POR: Select Internal Requisition for Confirm Receipt is set to *Yes*, internal requisition notifications will be sent to requesters in addition to standard requisition notifications.
- If the profile option POR: Select Inventory Replenishment Lines for Confirm Receipts is set to *Yes* inventory destination lines in addition to expense destination lines will be sent as notifications to requesters.

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## Using a Spreadsheet to Load Catalog Data

This document covers the following topics:

- [Introduction to the Catalog Structure](#) on page A-2
- [Using a Spreadsheet to Load the Catalog Data](#) on page A-3
- [Encoding Section](#) on page A-5
- [Language Section](#) on page A-6
- [Catalog Section](#) on page A-8
- [Contract Reference Section](#) on page A-9
- [Data Types](#) on page A-11
- [Data Section](#) on page A-11
- [Using the Bulk Loader with Extracted Items](#) on page A-28
- [Reviewing and Saving Your Spreadsheet File](#) on page A-29
- [Loading Your Spreadsheet File](#) on page A-29
- [Resolving Errors](#) on page A-31
- [Handling Special Characters](#) on page A-32
- [Loading Images](#) on page A-33
- [Translating Catalogs](#) on page A-35

This document explains how to create and load your catalog items into the Oracle iProcurement catalog using the spreadsheet loader.

You can use any combination of spreadsheet text files and XML files to maintain your catalog items. You are not restricted to using one method or the other. For

example, if you load your initial catalog data using XML, you can update the items using a spreadsheet text file.

This document is also available as a downloadable Readme file from the **Download Resources** page in the eContent Manager (when you log in with the iProcurement Catalog Administration responsibility). For subsequent releases of Oracle iProcurement, always check the Readme file in the eContent Manager for the latest information.

## Introduction to the Catalog Structure

At a high level, there are two areas that define the catalog—the catalog data and the catalog schema.

Catalog data consists of the items and services available for purchase. The associated prices for these items and services are also considered part of the catalog data.

Catalog schema is comprised of a combination of categories, local descriptors (sometimes known as category attributes) used to describe items in a specific category, and base descriptors (sometimes known as base attributes) used to describe any item or service in the catalog.

There are two types of categories in the catalog. Together, these categories define the hierarchy:

- Item categories, also known as genus categories, are used to group similar items. Item categories are found at the lowest level of the category hierarchy; therefore an item category can never be a parent category to a child category. Every item in the catalog must belong to an item category.
- Browsing categories, also known as navigation categories (or master or intermediate level categories), are used to define the levels of the category hierarchy. These types of categories can be either a parent or child to another category, but cannot contain any items.

Local descriptors apply only to items within a specific item category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Local descriptors can vary from one item category to another, and they are always optional.

Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. Some base attributes, such as Supplier Item number, are required; others, such as Manufacturer, are optional.

Typically, catalog schema is loaded using a separate XML file (see [Appendix C](#)); however, there are some instances in which you may need to create both the schema and the item and price data in one file. There are two profile options that can be used to dictate whether you can include schema in your catalog spreadsheet file:

- *POR:Load Auto Category*. Setting this profile option to Yes ensures that if the loader encounters a category in the item section of the text file that does not exist in the catalog, it will create the category. Setting this profile option to No will cause the loader to reject the item belonging to this category (unless you use the Apply Category Mapping option on the **Bulk Load Items & Price Lists** page, and category mapping already exists in Oracle e-Commerce Gateway). The default for this profile option is No. (In spreadsheet loading, if this profile option is set to Yes, the bulk loader creates both a name and key for your category; the key will be the same as the name.)

If you choose Yes for this profile option, you must map the new category to an internal category in Oracle Applications to successfully create requisitions for items in that category. See the online Help in the eContent Manager for more information on mapping.

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**Note:** If mapping is successful after using the Apply Category Mapping option, the *POR: Load Auto Category* profile option is ignored.

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- *POR:Load Auto Attrib*. Setting this profile option to Yes ensures that local descriptors referenced in the text file that do not exist in the catalog will be created. Setting this profile option to No will cause the loader to reject the item that references the local descriptors. The default for this profile option is No.

For more information on Oracle iProcurement profile options, see [Chapter 2](#). For information on setting profile options (user profiles), please refer to the *Oracle Applications User's Guide* or the *Oracle Applications System Administrator's Guide*.

## Using a Spreadsheet to Load the Catalog Data

Catalog content loaded into the catalog is divided into the following sections:

1. Encoding (optional): Used to define the character set that is used in the file.
2. Language (required): Used to identify the language in which the catalog data is loaded.

3. Catalog (required): Used to identify the catalog.
4. Contract Reference (optional): Used to associate a catalog with one or many contract purchase agreements established in Oracle Purchasing.
5. Data (required): Includes item information, price information, or both.

## Opening the Spreadsheet Text File

After you extract the spreadsheet text file template from the Zip file, follow these steps to open it:

1. To open the text template, start your spreadsheet software (for example, Microsoft Excel).
2. From your spreadsheet software, open the text template.

If you cannot find the template file in the Open dialog box, make sure that you are pointing to the correct directory, and set the File Type in the dialog box to All files.

3. Most spreadsheet software applications will ask you for the data type of the file. Select Delimited. You will then be asked to set delimiters for your data. Choose Tab. Do not change the tab appearance in the file.

## Spreadsheet Tips

Use the following spreadsheet tips:

- On your spreadsheet template, leave the fields directly below the Language Section, #ENCODING, Catalog Section, Contract Reference, Item Section, Price Section, and Item Price Section fields blank. (The sections you see vary depending on which template you downloaded.) These sections are headers, not fields into which data must be entered. Also leave a blank row between these sections, to avoid format errors.
- Required descriptors are marked with an asterisk (\*) in the spreadsheet text file.
- The maximum sizes mentioned later may be limited by your spreadsheet application. For example, Long Description allows up to 2,000 bytes, but your spreadsheet application may not allow this many characters in a column. If the maximum number of characters is limited by your spreadsheet application, open the .txt file in a text editor after you have completed your edits in the spreadsheet. Edit the file in the text editor to add more characters.

- Based on the default column formats, your spreadsheet program may have automatically applied some conversions to your data. For example, in some spreadsheet programs, leading or trailing zeros may be stripped. You should not change the format of the columns to fix the data. (For example, in Microsoft Excel, when you select a column and choose Cells ... from the Format menu, the Category will be set to General.) Instead, always check your finished file in a text editor. Fix any problems in the text editor, if needed. (Alternatively, if you are using Microsoft Excel, you can enter a single quotation mark (') in the spreadsheet field before the data to enforce a number or date format. Then save the file.)

## Encoding Section

If you are loading any special characters (such as é) in your spreadsheet file, and you are not using a UTF-8 editor, you must specify the proper character or multibyte encoding value, as shown in either of the following examples, to inform the spreadsheet loader of the encoding:

```
#ENCODING Cp1252
```

Or:

```
#ENCODING Unicode
```

Other language characters, such as Chinese, may require a different encoding value. Specify the encoding using the Internet Assigned Numbers Authority (IANA) registered character set names. A list of registered character sets is available from IANA at the following URL: <http://www.iana.org/assignments/character-sets>.

The encoding must support the format in which the file is saved. For example, if you specify Cp1252, the spreadsheet or text editor you are using must also support Cp1252 characters. The bulk loader uses the encoding to "read" the contents of the file. If this encoding does not support the characters in the file nor matches the encoding in which the file was saved, the system produces an error and rejects the file with a Failed status.

If you do not specify encoding in your spreadsheet file, UTF-8 is assumed, and the first line of the spreadsheet file should be the Language Section. You may omit the encoding if you are not using special characters in the file, or if you used a UTF-8 editor to edit the file.

When you download the spreadsheet template file, an encoding defaults. This default encoding comes from the profile option FND: NATIVE CLIENT ENCODING. For example, if this profile option is set to WE8MSWIN1252, the

encoding in the spreadsheet is Cp1252. (WE8MSWIN1252 is the technical name for the Cp1252 encoding. When you set the profile option, you select from a list of values.)

If the FND: NATIVE CLIENT ENCODING profile option is not set, the encoding defaults based on the language of Oracle iProcurement you are using (also called the session language). For example, in an American English session language, the encoding is Cp1252. Generally, you should download the template in the same language in which you will bulk load it, so that the Encoding code and spreadsheet column names match the bulk load language. If, however, you need to bulk load the template in a different language than which you downloaded it, first make sure the column headings in your bulk load file match the template headings in that language. Then make sure the encoding is correct as described in [Table A-1](#) and, if not, update it.

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**Note:** If the default encoding does not match the session language, you will need to either change the encoding or change the column headings. (The encoding defaults from the FND: NATIVE CLIENT ENCODING profile option, if set, but the column headings are always displayed in the session language.)

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For a list of the valid encodings by language, see [Table A-1](#).

## Language Section

The spreadsheet files that you submit must conform to the Langcode(-Subcode) standard.

The Langcode must be a two-letter language code as defined by ISO 639, Codes for the representation of the names of languages. Obtain a full list of these codes at the following site: <http://www.ics.uci.edu/pub/ietf/http/related/iso639.txt>.

The Subcode must be a country code from ISO 3166, Codes for the representation of names of countries. Obtain a full list of these codes at [http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/en\\_listp1.html](http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/en_listp1.html).

For example, the following illustrates setting the language to English and the country to the United States:

```
Language Section* EN-US
```

The language you specify must be installed in the Oracle iProcurement database. For more information on providing translations for catalog content, see: [Translating Catalogs](#) on page A-35.

The Oracle iProcurement catalog supports the following language code and territory code combinations, if the corresponding language is installed:

**Table A-1 Valid Encoding, Language, and Territory Codes**

<b>Encoding</b>	<b>Language</b>	<b>Language Code</b>	<b>Territory Code</b>
Cp1252	American English	EN	US
Cp1256	Arabic	AR	AE
Cp1252	Brazilian Portuguese	PT	BR
Cp1252	British English	EN	GB
Cp1251	Bulgarian	BG	BG
Cp1252	Canadian French	FR	CA
Cp1252	Catalan	CA	CT
Cp1250	Croatian	HR	YU
Cp1250	Czech	CZ	CZ
Cp1252	Danish	DA	DK
Cp1252	Dutch	NL	NL
Cp1256	Egyptian	EG	EG
Cp1252	Finnish	FI	FI
Cp1252	French	FR	FR
Cp1252	German	DE	DE
Cp1253	Greek	EL	GR
Cp1255	Hebrew	IW	IL
Cp1250	Hungarian	HU	HU
Cp1252	Icelandic	IS	IS
Cp1252	Italian	IT	IT
MS932	Japanese	JA	JP
MS949	Korean	KO	KR

Encoding	Language	Language Code	Territory Code
Cp1252	Latin American Spanish	ES	MX
Cp921	Lithuanian	LT	LT
Cp1252	Norwegian	NO	NO
Cp1250	Polish	PL	PL
Cp1252	Portuguese	PT	PT
Cp1250	Romanian	RO	RO
Cp1251	Russian	RU	SU
MS936	Simplified Chinese	ZH	CN
Cp1250	Slovak	SK	SI
Cp1250	Slovenian	SL	SI
Cp1252	Spanish	ES	ES
Cp1252	Swedish	SV	SE
MS874	Thai	TH	TH
MS950	Traditional Chinese	ZH	TW
Cp1254	Turkish	TR	TR

## Catalog Section

This section is required and is used to identify the catalog.

### Required and Validated Catalog Information

The following table describes the required catalog section fields:

**Table A-2 Catalog Section Fields**

Field Name	Required?	Default Value	Description and Validation
Supplier	Yes	(No default)	The supplier name specified here must match the corresponding supplier name defined in Oracle Applications, including using the same case. The limit is 240 bytes. *

Field Name	Required?	Default Value	Description and Validation
Title	No	(No default)	Name used to identify your file, for your own purposes. Although the bulk loader stores the title in the system, there is currently no validation performed on this value. The limit is 255 bytes.

\* If you're not sure of the supplier name, you can change it later by selecting it from an Oracle Applications list of suppliers on the **Specify Options** page just before you bulk load the file. See: [Loading Your Spreadsheet File](#) on page A-29.

### Example 1: Sample Catalog Section

The following table shows a sample catalog section in the spreadsheet template:

#ENCODING	Cp1252	
Language Section*	EN-US	
Catalog Section	Supplier*	Title
	Acme	Acme Catalog

## Contract Reference Section

This section is optional and is used to associate a catalog file with one or more contract purchase agreements established in Oracle Purchasing.

### Required and Validated Contract Information

The following table describes the required contract section fields; both fields are required if you want to specify a contract:

**Table A-3 Contract Section Fields**

Field Name	Required?	Default Value	Description and Validation
Operating Unit	Yes	(No default)	This is the operating unit defined in Oracle Applications in which the contract purchase agreement exists. If you are not using a multiple organizations setup (you have no operating units), enter All.
Contract Number	Yes	(No default)	This is the contract purchase agreement defined in Oracle Purchasing. The contract must be valid (approved, but not expired) for the specified operating unit. In addition, the contract must be established for the same supplier and currency as all items within the catalog file. You cannot specify more than one contract per operating unit in the same file.

**Example 2: Sample Contract Reference Section**

The following table shows a sample contract reference section in the spreadsheet template:

#ENCODING	Cp1252	
Language Section*	EN-US	
Catalog Section	Supplier*	Title
	Acme	Acme Catalog
Contract Reference	Operating Unit	Contract Number
	Vision Operations	1357
	Vision Services	9984

## Data Types

Each descriptor comes with a data type. When you specify the item and price information in your file, be sure to use the correct data type for the descriptors. For example, Lead Time is a Number data type. If you enter the text four instead of the number 4 for Lead Time, the system gives you an error.

The data types are listed below.

### Text

Values for this descriptor must be text or numbers only. The values cannot be translated; they will always display the same in all languages.

### Translatable Text

Values for this descriptor (text or numbers) can be translated; the catalog allows you to display different values for this descriptor in different languages. See: [Translating Catalogs](#) on page A-35.

### Number

Values for this descriptor must be a number only. The values can contain decimals (such as .86). Except for price and lead time, the numbers can be negative.

## Data Section

The data section of your spreadsheet file may contain any one of the following headings:

- **Item Price Section:** Used to create and maintain items and their respective prices. This heading is used in the ItemPrice.txt template file.
- **Item Section:** Used to maintain existing item information in the catalog. This heading is used in the Item.txt template file.
- **Price Section:** Used to maintain price information only. This heading is used in the Price.txt template file.

The first time items are added to the catalog, you must use the Item Price Section in the ItemPrice.txt file. This ensures that a price is associated with the item. Any subsequent item or price modifications may be performed through the Item Price (ItemPrice.txt file), Item (Item.txt template), or Price (Price.txt file) files depending on the type of information that is being updated.

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**Note:** If you delete an item using the Item.txt, ItemPrice.txt, or Category.txt templates, specifying only the minimally required information, all associated pricing is automatically removed; the item is deleted in all languages. If you want to delete only a price, not the item, use the Price.txt template.

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## Adding, Updating, and Deleting

Items and prices may be maintained using the action commands: ADD, UPDATE, SYNC, DELETE.

Action commands ADD and UPDATE are internally converted to SYNC. SYNC adds an item or price if it is new and updates it if it already exists. If the following item information in the file is the same as an existing item in the catalog, SYNC updates the item; otherwise, SYNC adds the item to the catalog as a new item:

- Supplier
- Supplier Item
- Operating Unit
- Supplier Part Auxiliary ID

For example, if two items have the same supplier, supplier part number, and buyer, but different supplier part auxiliary ID numbers, these will be separate items in the catalog:

Supplier	Supplier Part Number	Operating Unit	Supplier Part Auxiliary ID	Description
Acme	3255156	(none specified)	Green	Green T-shirt
Acme	3255156	(none specified)	Red	Red T-shirt

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**Note:** Assume the same manufacturer is specified for items 3255156 in the example above. If you later update this manufacturer, you need to provide two ITEM lines in the file, one to update the manufacturer for the Green item and one to update the Red.

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If the following price list line information (a row in the spreadsheet) is the same as an existing price list line in the catalog, SYNC updates the pricing information; otherwise, SYNC adds the new pricing to the catalog:

- Supplier
- Supplier Site
- Supplier Item
- Supplier Part Auxiliary ID
- Operating Unit
- Currency

For example, the following three items can coexist in the catalog because they do not all have the same supplier part auxiliary or supplier site:

Supplier	Supplier Part Number	Operating Unit	Supplier Part Auxiliary ID	Currency	Supplier Site
Acme	123456	Vision Operations	01	USD	San Jose
Acme	123456	Vision Operations	02	USD	San Jose
Acme	123456	Vision Operations	02	USD	Boston

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**Note:** If you specify the same item, with the same criteria as described in this section, more than once in the same file, the system processes the last identical entry and rejects the previous ones.

Items on the favorites list are updated by the bulk loader, if the bulk load file includes favorites list items.

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## Required and Validated Item and Price Information

The following table describes all of the base descriptors you may see in the template. Some of these fields do not appear in all templates. For example, pricing fields will not appear in the Item.txt template, because the Item.txt template includes only item information. If you downloaded the Category.txt template, additional fields may appear representing the local descriptors for the category you chose.

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**Note:** The maximum byte lengths given below are not necessarily the same as character lengths. For example, 700 Japanese characters will typically be longer than 700 bytes, and a special symbol (though it is a single character), may be more than one byte. Therefore, the actual, byte limits are given below. How these translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

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**Table A-4 Data Section Fields**

Field Name	Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
Category	—	Yes	(No default)	Unless <i>POR:Load Auto Category</i> is set to Yes, the category must be defined in Oracle iProcurement (or mapped to an internal category in Oracle e-Commerce Gateway). +	—	250
Action	—	Yes	The action from the preceding row, or SYNC	Indicates whether the information in the file should be added, updated, or deleted in the catalog. Valid options are ADD, UPDATE, SYNC, DELETE.	—	—
Supplier Item	SUPPLIER_PART_NUM	Yes	(No default)	Supplier item number. (If using the Price.txt template, the item must already exist in the catalog.)	Text	25
Supplier Part Auxiliary ID	SUPPLIER_PART_AUXILIARY_ID	No	(No default)	Alternative part number or identifier for the item. For example, you could use this field to show that an item with the same Supplier and Supplier Item number can be purchased in two different units of measure (UOMs). Requesters would see the item (with the same Supplier Item number) twice, but with different UOMs.	Text	255
Description	DESCRIPTION	Yes, when adding the item	(No default)	The description of the item or service.	Translatable Text	240

Field Name	Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
UNSPSC Code	UNSPSC	No	(No default)	The United Nations Standard Product and Service Code is an open, nonproprietary system of codes and standardized descriptions for classifying goods and services. To view a list of the UNSPSC codes, go to <a href="http://www.ecma.org/unspsc/">http://www.ecma.org/unspsc/</a> . (This information does not appear on the requisition, nor is it validated against existing UNSPSC codes.)	Text	700
Pricelist	PRICELIST	No	All-Buyers List Prices <i>or</i> <Operating Unit> Price List	One price list is allowed for each combination of supplier, operating unit, and currency.  If no operating unit or price list is specified, the bulk loader defaults All-Buyers List Prices for the price list name. If an operating unit is specified, the bulk loader defaults the operating unit name followed by Price List—for example Vision Services Price List.	Text	90
Operating Unit	BUYER	Yes, when a Supplier Site is specified	All-Buyers	Operating unit defined in Oracle Applications. If an operating unit is not specified here, this item is applicable to all operating units (All-Buyers). If <i>POR: Bulk Load for All Business Groups</i> is set to No, you can enter only an operating unit within your business group. (If it is set to Yes, you can enter any operating unit.) *	Text	700

Field Name	Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
Supplier Site	SUPPLIER_SITE	No	(No default)	<p>The supplier site must meet the following criteria:</p> <ul style="list-style-type: none"> <li>▪ Match the site name defined for that supplier in Oracle Applications. *</li> <li>▪ Be enabled for the specified Operating Unit. If the Operating Unit is blank or All-Buyers, the Supplier Site must be blank.</li> <li>▪ Be designated a Purchasing site in Oracle Applications.</li> <li>▪ If associated with an Inactive On date, the date must be later than today.</li> </ul>	Text	100
Unit	UOM	Yes if Unit Price is specified	(No default)	Must be a valid unit of measure code defined in Oracle Applications.	Text	30
Unit Price	PRICE	Yes (except in Item.txt)	(No default)	Must be a number greater than or equal to 0, such as 10, 1.99, or 2,000. Must not use any special formatting, such as currency symbols. The system uses the language code in the file to interpret the decimal separator in the number. See: <a href="#">Translating Catalogs</a> on page A-35.	Number	—
Currency	CURRENCY	Yes if Unit Price is specified	(No default)	Must be a valid currency code established in Oracle Applications. You cannot update a price list's currency once you create it; however, you can create more than one price list per buyer, each with a different currency. See <a href="#">Price Lists</a> on page A-20.	Text	4

Field Name	Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
Manufacturer	MANUFACTURER	No	(No default)	Name of the manufacturer of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.)	Translatable Text	240
Manufacturer Item	MANUFACTURER_PART_NUM	No	(No default)	Manufacturer-assigned part number of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.)	Text	30
Alias	ALIAS	No	(No default)	Alternate description or identifier for each item or service that people can enter when performing a search. For example, an alias for <i>soda</i> might be <i>pop</i> . To enter more than one alias, simply separate each alias with a comma—for example: <i>soda,pop,cola</i> . (This information does not appear on the requisition.)	Translatable Text	700
Lead Time	LEAD_TIME	No	(No default)	Amount of time, expressed in days, between the order date and the shipment date. Use any number greater than or equal to 0, such as 7 or 1.5. Seven is invalid. (This information does not appear on the requisition.)	Number	—

Field Name	Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
Image	PICTURE	No	(No default)	File name of the image that is associated with the item; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i> . Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif (This information does not appear on the requisition.) See: <a href="#">Loading Images</a> on page A-33.	Text	(Same as file name size)
Image URL	PICTURE_URL	No	(No default)	No longer used. If, however, you used this descriptor in previous releases, you may still use it to provide an image URL. Note that if both Image and Image URL are specified, Image URL is ignored.	Text	150
Thumbnail Image	THUMBNAIL_IMAGE	No	(No default)	File name of a smaller, thumbnail image for the item, for displaying on the <b>Search Results Summary, Search Results, and Compare Items</b> pages; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i> . Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif. (This information does not appear on the requisition.) See: <a href="#">Loading Images</a> on page A-33.	Text	(Same as file name size)

Field Name	Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
Attachment URL	ATTACHMENT_URL	No	(No default)	URL at which an attachment for each item or service can be viewed. Include the full URL; for example: <a href="http://www.us.oracle.com/attachment.gif">http://www.us.oracle.com/attachment.gif</a> . On the <b>Item Details</b> page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details)	700
Supplier URL	SUPPLIER_URL	No	(No default)	URL for the supplier's Web site. Include the full URL; for example: <a href="http://www.us.oracle.com">http://www.us.oracle.com</a> . On the <b>Item Details</b> page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details)	700
Manufacturer URL	MANUFACTURER_URL	No	(No default)	URL for the manufacturer's Web site. Include the full URL; for example: <a href="http://www.us.oracle.com">http://www.us.oracle.com</a> . On the <b>Item Details</b> page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details)	700
Item Type	ITEM_TYPE	No	(No default)	Indicator of whether the item is a <b>PRODUCT</b> or <b>SERVICE</b> (use capital letters). <b>Note:</b> The <b>ITEM_TYPE</b> is for informational purposes only. There is no relationship between this value and line types specified in Oracle Applications.	Text	—
Long Description	LONG_DESCRIPTION	No	(No default)	Detailed description of your item or service. (This information does not appear on the requisition.)	Translatable Text	2000

+ If the category exists in the catalog already, you can enter either the name or key here. (In XML bulk loading, you specify both a name, such as **Cookies**, and a key, such as **COOKIES\_UNSPSC\_CODE**, to identify a category.)

\* If you're not sure of the exact name, you can change it later by selecting it from an Oracle Applications list of valid names on the **Specify Options** page just before you bulk load the file. See: [Loading Your Spreadsheet File](#) on page A-29.

## Price Lists

For a given buyer, supplier, and currency, there can be only one price list; however, you can create more than one price list per buyer if the currencies are different.

For example, the following price lists can coexist because, in the first two price lists, the currencies are different and in the last price list, the operating unit is different:

**Table A-5 Coexisting Price Lists**

Price List Name	Operating Unit	Supplier	Currency
2002 Prices	Vision Services	Oracle	USD
2002 Prices	Vision Services	Oracle	GBP
2002 Prices	Vision Operations	Oracle	USD

The following price lists cannot coexist because the names are different; when uploading the price list 2002 Prices - Revised, Oracle iProcurement detects that a price list already exists for that operating unit, supplier, and currency, and it will not accept a new one:

**Table A-6 Price Lists that Cannot Coexist**

Price List Name	Operating Unit	Supplier	Currency
2002 Prices	Vision Services	Oracle	USD
2002 Prices - Revised	Vision Services	Oracle	USD

### Example 3: Items and Prices (ItemPrice.txt)

In this ItemPrice.txt spreadsheet example, two items for the supplier Acme are added to the catalog. Because no Pricelist and Operating Unit are given, the item is visible to all operating units. An item that is visible to all operating units is said to have a general (or list) price.

---



---

**Note:** This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

---



---

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123	Gold Ski			EA	350	USD
	Sports	SYNC	SKI-234	Silver Ski			EA	350	USD

#### Example 4: Operating Unit-Specific Items (ItemPrice.txt)

This example shows how to create operating unit-specific items and prices. In this example, the items cost 350 USD for all operating units except for Vision Operations, where they cost 324.19 EUR.

---



---

**Note:** This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

---



---

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123	Gold Ski			EA	350	USD
	Sports	SYNC	SKI-234	Silver Ski			EA	350	USD
	Sports	SYNC	SKI-123	Gold Ski	Vision Prices	Vision Operations	EA	324.19	EUR
	Sports	SYNC	SKI-234	Silver Ski	Vision Prices	Vision Operations	EA	324.19	EUR

### Example 5: Operating Unit-Specific Prices (Price.txt)

In this example, a new Price.txt file is created to update prices for the operating unit-specific items created in Example 4 above. The operating unit is Vision Operations, and the prices are updated only for requesters in that operating unit. In addition, a new price is added for requesters in Vision Operations; the price applies only to items coming from the Bonn site.

---



---

**Note:** This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

---



---

#ENCODING	Cp1252							
Language Section*	EN-US							
Catalog Section	Supplier*	Title						
	Acme	Acme Catalog						
Contract Reference	Operating Unit	Contract Number						
Price Section	Action*	Supplier Item*	Pricelist	Operating Unit	Supplier Site	Unit*	Unit Price*	Currency*
	SYNC	SKI-123	Vision Prices	Vision Operations		EA	300	EUR
	SYNC	SKI-234	Vision Prices	Vision Operations		EA	300	EUR
	SYNC	SKI-234	Vision Prices	Vision Operations	BONN	EA	280	EUR

---

**Note:** This example assumes the items were already added to the Vision Operations operating unit using the ItemPrice.txt template. Use Price.txt only to update the prices of items that already exist (that were created using ItemPrice.txt). Otherwise, the items will be rejected.

---

### Example 6: Item Updates (ItemPrice.txt)

This example updates the description of SKI-123. Using both this and the previous examples, this item is updated in all operating units except Vision Operations (since no operating unit is specified). To update the item in Vision Operations, you would need to create a second SKI-123 row in the example, identical to the previous row, but specifying Vision Operations as the operating unit.

---



---

**Note:** This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

---



---

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123	Triple Gold Ski			EA	350	USD

---



---

**Note:** You could also have used Item.txt to make this update.

---



---

### Example 7: Item Deletion (ItemPrice.txt)

This example deletes SKI-234. Using both this and the previous examples, this item is deleted in all operating units except Vision Operations (since no operating unit is specified). To delete the item in Vision Operations, you would need to create a second SKI-234 row in the example, identical to the previous row, but specifying Vision Operations as the operating unit.

---



---

**Note:** This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

---



---

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	DELETE	SKI-234	Silver Ski			EA	350	USD

---



---

**Note:** You could also have used Item.txt to make this update.

---



---

### Example 8: Price Deletion (Price.txt)

In this example, the operating unit-specific price for SKI-234 is deleted. Only the Vision Operations price for the Bonn site is deleted, not the item and not the other list prices or operating unit-specific prices for the item.

---



---

**Note:** This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

---



---

#ENCODING	Cp1252							
Language Section*	EN-US							
Catalog Section	Supplier*	Title						
	Acme	Acme Catalog						
Contract Reference	Operating Unit	Contract Number						
Price Section	Action*	Supplier Item*	Pricelist	Operating Unit	Supplier Site	Unit*	Unit Price*	Currency*
	DELETE	SKI-234	Vision Prices	Vision Operations	BONN	EA	280	EUR

## Case Sensitivity

All values are case sensitive except the following values:

- Category, such as Ball Point Pens
- Descriptor, such as Ink Color or Lead Time
- Unit, such as EA
- Supplier Site

For example, you can specify the category as Ball Point Pens or Ball point pens, and they would be treated as the same. Your item would be added to the category Ball Point Pens. But the supplier item number AB457Z would be treated as a different item number than ab457z. The system would add ab457z to the catalog if AB457Z already exists.

Unit is a special case. Oracle Applications is case sensitive; however, if the bulk load file uses BOX, and Oracle Applications uses Box, the item is not rejected. BOX and Box are considered a valid match.

## Blanking Out a Descriptor

If you want to delete the value for a particular descriptor for an item, use the text #DEL, as shown in the following example. You cannot delete values for required descriptors or for the Supplier Part Auxiliary ID. (To delete the Supplier Part Auxiliary ID for an item, you would need to delete the item and recreate it without the Supplier Part Auxiliary ID.)

### Example 9: Deleting Information

The following table shows a sample spreadsheet template that uses #DEL to delete a value that describes an item:

#ENCODING	Cp1252						
Language Section*	EN-US						
Catalog Section	Supplier*	Title					
	Acme	Acme Catalog					
Item Section	Category*	Action*	Supplier*	Supplier Item*	Description*	UNSPSC Code	Long Description
	Ball Point Pens	SYNC	Acme	1896225	Black, Ball Point Pen, Medium point, Extra Wide Barrel		#DEL

In this example, item 1896225 no longer has a value for Long Description in the catalog. The Long Description descriptor itself still displays, but for your item, no value exists for Long Description.

## Reclassifying an Item Under Another Category

If you want to move items formerly under one category, such as Ball Point Pens, to another category, such as Felt Pens, list all of the items under Felt Pens using the SYNC action. (You cannot have the same item in more than one category.)

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---

**Note:** When you move an item from one category to another, you lose the local descriptors. For example, you originally add an item under the category Felt Pens, using Tip Width and Ink Color as local descriptors. You then move the item to Ball Point Pens. The item will no longer display the Tip Width and Ink Color you specified, even if Ink Color exists in the new category. Local descriptors are specific to each category.

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## Using the Bulk Loader with Extracted Items

You can use the bulk loader to update any extracted item that has a supplier and supplier part number associated with it. For example, the extractor does not include manufacturer information with the items; however, you could use the bulk loader to specify a manufacturer for an extracted item.

Recall the rules discussed in [Adding, Updating, and Deleting](#) on page A-12. These rules determine whether you are updating an item or creating a new item. For example, if you provide a supplier part auxiliary ID for an extracted item, the bulk loader creates a new item.

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**Note:** In general, you should extract an item first, then bulk load updates to it if desired. If you bulk load the item first, then extract it, the item may not be updated, but may be created as a new item.

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You cannot update the category of extracted items. For extracted items, you can use the bulk loader to change only the following descriptors (in addition to any new descriptors you may have added to the catalog):

- Manufacturer
- Manufacturer Item number
- Description
- Long Description

- Alias
- Attachment URL
- UNSPSC Code
- Availability
- Lead Time
- Item Type
- Image Thumbnail Image
- Supplier URL
- Manufacturer URL

Using the bulk loader, you cannot delete items that were extracted from Oracle Purchasing. To delete items that are considered extracted, delete them in Oracle Applications, then rerun the item extractor.

See [Extracting Catalog Data from Oracle Applications](#) on page 3-16 for more information on the extractor.

## Reviewing and Saving Your Spreadsheet File

See the tables in the previous sections that describe the information in the template to be sure that the information in your spreadsheet file will validate successfully.

Save your file as a tab-delimited text file with a .txt extension. You can give the file any name. (If you did not provide a Title for your file, the bulk loader stores the file name in the system.)

## Loading Your Spreadsheet File

Once you have created and reviewed your spreadsheet file, load it to Oracle iProcurement as follows:

1. Use the iProcurement Catalog Administration responsibility to access the eContent Manager home page.
1. In the navigation bar on the left, click "Bulk Load Items & Price Lists."
2. In the File Name field, enter either the file name and path, or click Browse to navigate to your spreadsheet file.
3. Under Choose a File, File Type, select Tab-delimited text.

4. If you would like to replace certain values, such as Supplier and Supplier Site, in your catalog file, click Specify Options and do the following:
  - Select a Supplier if you wish to replace the Supplier specified in the file.
  - Select an Operating Unit for which the items in the file are applicable.
  - Select a Supplier Site\* to load these items for a particular Supplier Site. Oracle iProcurement displays only the list of sites valid for that operating unit and supplier.
  - You may optionally select a Contract Purchase Agreement\* that is applicable to all items in the file. Oracle iProcurement retrieves this list of valid agreements from Oracle Purchasing, for the Operating Unit and Supplier you chose. (If you also chose a Supplier Site, Oracle iProcurement displays only a list of agreements valid for that site.)

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**Note:** The Contract Purchase Agreement Description is a display-only field that defaults the description associated with the agreement.

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\* This option is only available when you select an Operating Unit and Supplier.

5. Click Start Load Now to send your file.

As soon as the load is started, the screen displays the Bulk Load Confirmation message and job number.
6. To check the status of your job, click View Load Status on the job confirmation page.

The View Bulk Load Status page tells you the status of your entire job:

- Pending (waiting to be processed)
- Running (processing the file)
- Completed
- Completed with Errors (loaded the file, but rejected some of the lines)
- Failed (encountered a format or encoding error)

Large files may take some time to load. You do not need to remain logged in while your job completes. If you need, click the Refresh or Reload button on your browser to update the status.

---

As an alternative to the **View Bulk Load Status** page, you can also view bulk load jobs in Oracle Applications:

1. In Oracle Applications, in the Oracle Purchasing or System Administration responsibilities, navigate to the View Requests window as follows:

From Oracle Purchasing: Requests

From System Administration: Requests > View

2. In the Find Requests window, choose to find all requests or enter a specific Request ID, Name, or other information.

The bulk load number assigned to your bulk load job in the eContent Manager is the same as the Request ID. The request name is Catalog Bulk Load - Items & Price Lists.

3. You may be able to see more details about the bulk load and errors using the View Log button. (After you choose View Log, you may need to use the Next button to page through the entire log.)

If you still cannot determine the cause of an error using the log, temporarily set the profile option *POR: Set Debug Catalog Loader ON* to Yes with Detail and bulk load the file again. Setting this profile option to Yes or Yes with Detail displays a more detailed log of the bulk load process for that job. (This profile option should be set to Yes or Yes with Detail only while troubleshooting.)

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**Note:** If you are not the same user who submitted the job, the View Log button is disabled.

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## Resolving Errors

The **View Bulk Load Status** page alerts you to failures or rejected lines in your spreadsheet file. Oracle iProcurement looks for errors in your file in two phases: format errors and validation errors.

### Format errors (failures)

Format errors occur when the spreadsheet file fails validation. Some examples of format errors include special characters in your file that are not covered by the character set specified in the #ENCODING declaration, or extra rows or columns in your spreadsheet. If a format error is encountered, the load process stops, and a Failed status is returned.

If your job fails, fix the file and resubmit it for processing.

### Validation errors (rejected lines)

Once format errors, if any, are resolved, Oracle iProcurement checks for validation errors. Validation errors occur when information that you entered in your spreadsheet file does not match corresponding information already held within Oracle iProcurement or Oracle Applications. For example, if you enter values for Unit or Currency that Oracle Applications does not recognize, a validation error will occur. The individual item or price for which the validation errors occurred will be rejected.

If your job completes with errors, either select the job and click View Rejected Lines or click the link in the Rejected Lines column to view the errors. Fix the file and resubmit it for processing.

## Handling Special Characters

If you want to include special characters (such as trademark symbols) in your text file, follow the steps below. You only need to follow these steps if the special characters are not supported by the encoding in which the file was saved. For example, a file created in Germany likely supports saving files with umlaut characters, and you do not have to follow these instructions for inserting umlaut characters. Follow these instructions if the encoding in which your file is saved does not support the special character. Trademark or copyright symbols are examples of these.

To insert special characters in your spreadsheet text file:

1. Open your text file in your spreadsheet application.
2. Access the Character Map utility in Windows.

Depending on your computer's configuration, you may be able to find this utility in the Start menu: choose Program, then Accessories.

3. Select the proper encoding for the contents of the file. For example, if the contents of the file are in German, select the Windows Western encoding (Cp1252). See [Encoding Section](#) on page A-5.

You may find the encoding in a Subset drop-down menu or in an advanced view area of the Character Map window. If you cannot find the encoding, skip this step.

4. In the Characters to Copy field, enter your text, then double-click the special character from the characters display in the Character Map window—or select the special character that you will copy into your spreadsheet.

You may need to select a font such as Times New Roman from the Font menu in the Character Map window.

5. Copy and paste the text or character from the Characters to Copy field to your spreadsheet text file. (You can use the Copy button in the Character Map window and the Paste command in the spreadsheet application.)
6. Make sure the proper encoding is entered in the #ENCODING field in the spreadsheet text file, as usual, according to the language contents of the file. See [Encoding Section](#) on page A-5.
7. Save and upload your spreadsheet .txt file.

An alternative to using the Character Map utility is to use the "Alt" number key sequence for the special character. (Hold down the Alt key while entering the number sequence. You must use the number keypad on your keyboard to enter the numbers.) For example:

- Alt + 0153—Trademark ™
- Alt + 0174—Registered trademark ®
- Alt + 0169—Copyright ©
- Alt + 0196—A umlaut Â

These numbers are the decimal equivalents of a letter. For example, 065 is the decimal equivalent of A.

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**Note:** If you use "Alt" number key sequences, requesters cannot search on the special characters. For example, if the requester enters the trademark symbol (™) in the Search field, the search engine finds matching items if you used steps 1 through 7 above to copy in the symbol. If you used the "Alt" number key sequence for the symbol, requesters will not find the matching items by entering ™.

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## Loading Images

You can specify or load two kinds of images for items:

- Images that display on the **Item Details** page when requesters view the details of an item. (Use the Image field in the bulk load file.)
- Smaller, thumbnail versions of the images that display on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. (Use the Thumbnail Image in the bulk load file.)

For a complete overview of image management, including recommendations on thumbnail image sizes, see [Managing Images](#) on page 3-50.

There are two ways to associate items with images in your bulk load file:

- Copy the images to the local server and indicate the image file names in the spreadsheet file.
- Reference the URLs of the images in the spreadsheet file.

To copy the images to the local server:

1. For the *POR: Hosted Images Directory* profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA\_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA\_MEDIA directory.

2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Use the appropriate columns in your spreadsheet file to specify the image file name, such as bluepen.gif.

To specify an image for the **Item Details** page, use the Image column. To specify a thumbnail image for the search results and comparison pages, use the Thumbnail Image field.

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**Note:** The file name for the image is case sensitive. For example, if the image file name is bluepen.gif, but you specify BluePen.gif in the Image field, the image will not display.

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4. Load your spreadsheet file.

To specify the URL of the image that resides on the Internet:

1. Obtain the full path of the image (for example, <http://www.oracle.com/toplogo2.gif>).

2. Insert this full path into the appropriate columns in your spreadsheet file.

To specify an image for the **Item Details** page, use the **Image** column. To specify a thumbnail image for the search results and comparison pages, use the **Thumbnail Image** field.

3. Load your spreadsheet file.

If you specify both an image URL (using the old **PICTURE\_URL** field) and a server image (using **PICTURE**) for an item, Oracle iProcurement displays the server image.

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**Note:** Instead of creating separate detailed and thumbnail images, you could use the same image file name or URL for both the **Image** and **Thumbnail Image** fields. Then set either the *POR: Thumbnail Width* or *POR: Thumbnail Height* profile option to resize the image for thumbnails. For instructions, see [Managing Images](#) on page 3-50.

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## Translating Catalogs

You can load your catalog items in any or all of the languages that Oracle iProcurement supports. The language you specify in your file must be installed in the Oracle iProcurement database.

When you add an item to the catalog, it is added only in the language specified at the beginning of your spreadsheet file. To provide your catalog items in another language, translate the spreadsheet file and load it again specifying the supported language and the action command SYNC.

When you delete an item, specifying an action of DELETE, the item is deleted for all languages installed in the Oracle iProcurement database.

When an item is created in another language, only the translatable descriptors (those with a Translatable Text data type) need to be specified in the spreadsheet file (along with minimally required values). All of the non-translatable descriptors, such as Manufacturer Item number, are automatically inherited from the original language in which the item was created. If you change the value of a non-translatable descriptor when loading the translated file, the change will appear in all languages installed in the Oracle iProcurement database. Only translatable descriptors can vary by language. For example, if you change the Manufacturer Item number in one language, it is changed in all languages; however, if you change the item's Description, it is changed only in the language specified in the file.

Load your catalog items in one language at a time. For example, load your catalog items in English, using the EN-US language code, then translate and load that catalog file in French using the FR-FR language code.

The information that is needed to translate an item includes:

- Supplier (for validation purposes) - required
- Supplier Item (for validation purposes) - required
- Category (for validation purposes) - required
- Supplier Part Auxiliary ID (for validation purposes) - required if the item you are translating has a Supplier Part Auxiliary ID. The Supplier Part Auxiliary ID is used to uniquely identify an item.
- Description (for validation purposes and translation, if applicable) - required when adding an item for the first time to any language
- Descriptors whose TYPE=Translatable Text, if applicable - optional

---

---

**Note:** The column headings (descriptor names) in your spreadsheet must match exactly those given in the system for that language. To ensure that the column headings are valid for the language you are translating to, log on to Oracle iProcurement in that language and download the spreadsheet template file. The file will include column headings in that language. Either copy your translated item information to this file, or overwrite the column headings in your existing file with the translated column headings (whichever is easier for you).

---

---

## Pricing

Pricing does not need to be included in the translated file. When an item is translated to another language, its pricing is also automatically copied over to that language. You could use the Item.txt template to translate the item information and omit the pricing information.

As with all non-translatable descriptors, if you change the pricing information in one language, it is changed in all languages. For example, you bulk load an item that costs 2 USD, specifying EN-US (English) in the file. Later, you change EN-US to FR-FR (French) and change the price from 2 USD to 4 USD. The price is changed in all languages.

In another example, you publish an EN-US (English) file with USD prices for Operating Unit A; you then create a FR-FR (French) version of that catalog file, changing the pricing from USD to FRF, for Operating Unit A. In this example, Oracle iProcurement now has two price lists, one in USD and one in FRF, for Operating Unit A, and the people in Operating Unit A see prices in those two currencies. If, however, you publish USD prices only for Operating Unit A and FRF prices only for Operating Unit B, then people in those operating units see only their prices. Price list currencies are independent of language.

The system uses the language code specified in your file to determine the decimal separator in a number. For example, if you specify American English (EN-US) in the file, the system interprets periods as decimal separators. If you specify German (DE-DE) in the file, the system interprets commas as decimal separators. The following table shows some examples:

**Table A-7 Example Prices and Languages**

Language in Bulk Load File	Price in Bulk Load File	Displayed Price when <i>ICX: Numeric characters</i> is ,	Displayed Price when <i>ICX: Numeric characters</i> is .
EN-US	2,000	2,000.00	2.000,00
DE-DE	2,000	2.00	2,00
EN-US	10000.00	10,000.00	10.000,00
DE-DE	10000.00	1,000,000.00	1.000.000,00

**Note:** Decimal separators are influenced by the profile option *ICX: Numeric characters* in Oracle Applications. If this profile option is set to use periods as decimal separators, then the decimal separator that requesters see is a period regardless of their language. The bulk loader still uses the language code in the file to determine where the decimal separator is placed. The profile option determines how the price displays to requesters. (If the profile option *ICX: Numeric characters* is not set, Oracle iProcurement uses the `nls_numeric_` parameters database setting to determine how to display the price.)



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## Using XML to Load Catalog Data

This document covers the following topics:

- [Introduction to the Catalog Structure](#) on page B-2
- [Using XML to Load the Catalog Data](#) on page B-4
- [Version and Character Set Encoding](#) on page B-5
- [Language Identification](#) on page B-6
- [Administrative Section](#) on page B-8
- [Data Types](#) on page B-10
- [Root Descriptors Section](#) on page B-11
- [Catalog Data Section](#) on page B-14
- [Using the Bulk Loader with Extracted Items](#) on page B-37
- [Reviewing and Saving Your XML File](#) on page B-38
- [Loading Your XML File](#) on page B-38
- [Resolving Errors](#) on page B-40
- [Handling Special Characters](#) on page B-41
- [Loading Images](#) on page B-42
- [Translating Catalogs](#) on page B-44
- [Backwards Compatibility](#) on page B-48

This document explains how to create and load your catalog items into the Oracle iProcurement catalog using the XML interface described in this document. The XML file that is used to load this information into Oracle iProcurement can be generated

in a text editor, commercial XML generator program, or an XML generator program that you write yourself.

You can use any combination of spreadsheet text files and XML files to maintain your catalog items. You are not restricted to using one method or the other. For example, if you load your initial catalog data using XML, you can update the item using a spreadsheet text file.

This document is also available as a downloadable Readme file from the **Download Resources** page in the eContent Manager (when you log in with the iProcurement Catalog Administration responsibility). For subsequent releases of Oracle iProcurement, always check the Readme file in the eContent Manager for the latest information.

## Introduction to the Catalog Structure

At a high level, there are two areas that define the catalog—the catalog data and the catalog schema.

Catalog data consists of the items and services available for purchase. The associated prices for these items and services are also considered part of the catalog data.

Catalog schema is comprised of a combination of categories, local descriptors (sometimes known as category attributes) used to describe items in a specific category, and base descriptors (sometimes known as base attributes) used to describe any item or service in the catalog.

There are two types of categories in the catalog. Together, these categories define the hierarchy:

- Item categories, also known as genus categories, are used to group similar items. Item categories are found at the lowest level of the category hierarchy, therefore an item category can never be a parent category to a child category. Every item in the catalog must belong to an item category.
- Browsing categories, also known as navigation categories (or master or intermediate level categories), are used to define the levels of the category hierarchy. These types of categories can be either a parent or child to another category, but cannot contain any items.

Local descriptors apply only to items within a specific item category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Local descriptors may vary from item category to item category and they are always optional.

Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. Some base descriptors, such as Supplier Item number, are required; others, such as Manufacturer, are optional.

Typically, catalog schema is loaded using a separate XML file (see [Appendix C](#)); however, there are some instances in which you may need to create both the schema and the item and price data in one file. There are three profile options that can be used to dictate whether you can include schema in your catalog XML file:

- *POR: Load Auto Category*. Setting this profile option to Yes ensures that if the loader encounters a category in the item section of the XML file that does not exist in the catalog, it will create the category. Setting this profile option to No will cause the loader to reject the item belonging to this category (unless you use the Apply Category Mapping option on the **Bulk Load Items & Price Lists** page, and category mapping already exists in Oracle e-Commerce Gateway). The default for this profile option is No. If this profile option is set to Yes, you should provide both the name and key (in either order) when specifying a new category in your file. (This requirement does not apply to the other two profile options.) For example:

```
<OWNER>
  <KEY>UNSPSC_44121704</KEY>
  <NAME>Ball Point Pens</NAME>
</OWNER>
```

Or:

```
<OWNER>
  <NAME>Ball Point Pens</NAME>
  <KEY>UNSPSC_44121704</KEY>
</OWNER>
```

If you choose Yes for this profile option, you must map the new category to an internal category in Oracle Applications to successfully create requisitions for items in that category. See the online Help in the eContent Manager for more information on mapping.

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**Note:** If mapping is successful after using the Apply Category Mapping option, the *POR: Load Auto Category* profile option is ignored.

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- *POR:Load Auto Attrib*. Setting this profile option to Yes ensures that local descriptors referenced in the XML file that do not exist in the catalog will be

created. Setting this profile option to No will cause the loader to reject the item that references the local descriptors. The default for this profile option is No.

- *POR:Load Auto Root*. Setting this profile option to Yes allows the loader to create base descriptors that are defined in the ROOT\_DESCRIPTORs section of the XML file. Setting this profile option to No means the loader ignores the base descriptors that are defined for the item. The file will still load successfully, and the items will be created; however, the base descriptors will not be created. The default for this profile option is No.

---

---

**Note:** These profile options are only applicable when defining the catalog schema through the Catalog Data DTD. These profile options are ignored when creating catalog schema through the Catalog Schema DTD.

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For more information on Oracle iProcurement profile options, see [Chapter 2](#). For information on setting profile options (user profiles), please refer to the *Oracle Applications User's Guide* or the *Oracle Applications System Administrator's Guide*.

## Using XML to Load the Catalog Data

Catalog content loaded into the catalog is divided into the following main sections:

1. **Admin (required):** Used to identify the catalog. Within the Admin section, you may optionally associate catalog content with one or more contract purchase agreements established in Oracle Purchasing.
2. **Root Descriptors (optional):** Used to define new base descriptors that are referenced in the Data section.
3. **Data (required):** Includes item information, price information, or both. The catalog data section may optionally contain local descriptors.

There are two additional sections, Schema and Hierarchy, that are used solely for supporting catalog files created for previous releases of Oracle iProcurement. New catalog files should not contain these two sections. For more information, see: [Backwards Compatibility](#) on page B-48.

## The Catalog Data Document Type Definition (DTD)

A Document Type Definition (DTD) is a formal definition, or summary, of the requirements of a particular XML file. This DTD will help you structure your XML

file. However, you can also use the example XML files in this document to help you create your XML file.

Your XML file must conform to the following World Wide Web Consortium (W3C) specifications:

- The W3C recommendation for Extensible Markup Language (XML) 1.0 at <http://www.w3.org/TR/2000/REC-xml-20001006>
- The W3C proposed recommendation for Namespaces in XML at <http://www.w3.org/TR/1999/REC-xml-names-19990114>
- The `xml:lang` attribute as described in Language Identification.

The Catalog Data DTD is provided in the Zip resources download. The DTD also exists in the `$OA_HTML` directory (or corresponding directory based on your platform). The DTD file name is `CatalogData.dtd`.

## Version and Character Set Encoding

Every XML file must contain a line that indicates the version of XML you are using and any special encoding (or character set) you are using within the file. The version should always be 1.0. If your item descriptions and other catalog data use basic alphanumeric characters (a-z, AZ, 0-9, or any character with an ASCII code between 0 and 127), or if you used a UTF-8 editor to edit the file, you do not need to specify the encoding, so the beginning of your XML file can look like this:

```
<?xml version="1.0" ?>
```

When no document encoding is specified, UTF-8 is assumed.

If you are not using a UTF-8 editor and your catalog content includes special characters (such as the copyright or registered trademark symbols), accented characters (for example, é), or any characters that have a binary representation greater than 127, you must specify the character set in which your editor saves the file. For example, if you are creating the file in Spanish, using an ISO-8859-1 editor that supports Spanish characters, then you should also enter an encoding of ISO-8859-1 in your XML file, as follows:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
```

The system uses the encoding you specify in your XML file to "read" the contents of the file. If this encoding does not support the characters in the file nor matches the encoding in which the file was saved, the system produces an error and rejects the file with a Failed status.

Specify the encoding using the Internet Assigned Numbers Authority (IANA) registered character set names. A list of registered character sets is available from IANA at the following URL: <http://www.iana.org/assignments/character-sets>.

## Language Identification

The XML documents that you submit must support language specifications using the `xml:lang` attribute as described in the Extensible Markup Language (XML) 1.0 W3C recommendation (visit <http://www.w3.org/TR> for all published and draft recommendations).

The following, extracted from the XML 1.0 specification, describes how language is identified:

LanguageID ::= Langcode (- Subcode)\*

LangCode ::= ISO639Code

According to the specification, the Langcode must be a two-letter language code as defined by ISO 639, Codes for the representation of the names of languages. Obtain a full list of these codes at the following site:

<http://www.ics.uci.edu/pub/ietf/http/related/iso639.txt>.

The Subcode must be a country code from ISO 3166, Codes for the representation of names of countries. Obtain a full list of these codes at

[http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/en\\_listp1.html](http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/en_listp1.html).

For example, the following illustrates setting the language to English and the country to the United States:

```
<CATALOG xml:lang="EN-US">
```

The language you specify must be installed in the Oracle iProcurement database. For more information on providing translations for catalog content, see: [Translating Catalogs](#) on page B-44.

The Oracle iProcurement catalog supports the following language code and territory code combinations, if the corresponding language is installed:

**Table B-1 Valid Language and Territory Codes**

Language	Language Code	Territory Code
American English	EN	US

---

<b>Language</b>	<b>Language Code</b>	<b>Territory Code</b>
Arabic	AR	AE
Brazilian Portuguese	PT	BR
British English	EN	GB
Bulgarian	BG	BG
Canadian French	FR	CA
Catalan	CA	CT
Croatian	HR	YU
Czech	CZ	CZ
Danish	DA	DK
Dutch	NL	NL
Egyptian	EG	EG
Finnish	FI	FI
French	FR	FR
German	DE	DE
Greek	EL	GR
Hebrew	IW	IL
Hungarian	HU	HU
Icelandic	IS	IS
Italian	IT	IT
Japanese	JA	JP
Korean	KO	KR
Latin American Spanish	ES	MX
Lithuanian	LT	LT
Norwegian	NO	NO
Polish	PL	PL
Portuguese	PT	PT
Romanian	RO	RO
Russian	RU	SU

<b>Language</b>	<b>Language Code</b>	<b>Territory Code</b>
Simplified Chinese	ZH	CN
Slovak	SK	SI
Slovenian	SL	SI
Spanish	ES	ES
Swedish	SV	SE
Thai	TH	TH
Traditional Chinese	ZH	TW
Turkish	TR	TR

## Administrative Section

This section is required and is used to identify the catalog. Within this section, you may optionally associate catalog content with one or more contract purchase agreements established in Oracle Purchasing.

## Required and Validated Administrative Information

The following table describes the required administrative section fields:

**Table B-2 Administration Section Fields**

<b>Tag</b>	<b>Required?</b>	<b>Default Value</b>	<b>Description and Validation</b>
<NAME>	Yes	(No default)	Name used to identify your file, for your own purposes. Although the bulk loader stores this name in the system, there is currently no validation performed on this value. The limit is 255 bytes.
<DATE>	Yes	(No default)	Date of creation or modification. Use a date format of your choice; there is no validation performed on this value.

Tag	Required?	Default Value	Description and Validation
<SOURCE>	Yes	(No default)  <b>Note:</b> If catalogs are downloaded from an Oracle Exchange, the source defaults to OEX	Author of the XML document. Can be a person, company, or tool. There is no validation performed on this value.
<BUYER>	Yes, if CONTRACT_NUM is specified	(No default)	This is the operating unit defined in Oracle Applications in which the contract purchase agreement exists. If you are not using a multiple organizations setup (you have no operating units), enter All.
<CONTRACT_NUM>	Yes, if BUYER is specified	(No default)	This is the contract purchase agreement defined in Oracle Purchasing. The contract must be valid (approved, but not expired) for the specified operating unit. In addition, the contract must be established for the same supplier and currency as all items within the catalog file. You cannot specify more than one contract per operating unit in the same file.

## XML Example 1: Entering Administrative Information

```
<ADMIN>
  <NAME>Acme Winter Catalog 2002</NAME>
  <INFORMATION>
    <DATE>08-DEC-2002</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>
```

## XML Example 2: Entering Administrative Information

```
<ADMIN>
  <NAME>Acme Winter Catalog 2002</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>  <!--SOURCE and DATE are interchangeable-->
    <DATE>08-DEC-2002</DATE>
```

```
</INFORMATION>
</ADMIN>
```

### XML Example 3: Associating a Catalog with a Contract Purchase Agreement

```
<ADMIN>
  <NAME>Acme Winter Catalog 2002</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>08-DEC-2002</DATE>
  </INFORMATION>
  <CONTRACTS>
    <CONTRACT_REFERENCE>
      <BUYER>Vision Operations</BUYER>
      <CONTRACT_NUM>1357</CONTRACT_NUM>
    </CONTRACT_REFERENCE>
  </CONTRACTS>
</ADMIN>
```

### XML Example 4: Associating a Catalog with Multiple Contract Purchase Agreements

```
<ADMIN>
  <NAME>Acme Winter Catalog 2002</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>08-DEC-2002</DATE>
  </INFORMATION>
  <CONTRACTS>
    <CONTRACT_REFERENCE>
      <BUYER>Vision Operations</BUYER>
      <CONTRACT_NUM>1357</CONTRACT_NUM>
    </CONTRACT_REFERENCE>
    <CONTRACT_REFERENCE>
      <BUYER>Vision Services</BUYER>
      <CONTRACT_NUM>9987</CONTRACT_NUM>
    </CONTRACT_REFERENCE>
  </CONTRACTS>
</ADMIN>
```

## Data Types

Each descriptor comes with a data type. When you specify the item and price information in your file, be sure to use the correct data type for the descriptors. For example, Lead Time is a Number data type. If you enter the text four instead of the

number 4 for Lead Time, the system gives you an error. You cannot create data types; any descriptor you specify must adhere to one of the data types listed below.

## Text

Values for this descriptor must be text or numbers only. The values cannot be translated; they will always display the same in all languages.

## Translatable Text

Values for this descriptor (text or numbers) can be translated; the system allows you to display different values for this descriptor in different languages. See: [Translating Catalogs](#) on page B-44.

## Number

Values for this descriptor must be a number only. The values can contain decimals (such as .86). Except for price and lead time, the numbers can be negative.

## Root Descriptors Section

The root descriptors section is optional. Its intent is to add base descriptors to the catalog that currently do not exist but are referenced in the catalog data section of the XML file. This feature is useful when loading catalogs that are received from an external source, such as Exchange.Oracle.com.

While this section may be used to create base descriptors, it is highly recommended that this function is controlled through the Catalog Schema DTD. One of the advantages of using the Catalog Schema DTD is that all of the schema information, including categories and local descriptors for the categories, is contained in a single file. Please see [Appendix C](#) for further instructions and examples on using the Catalog Schema DTD.

If you decide to create base descriptors using the Root Descriptors section, you must ensure that the appropriate profile option is enabled in Oracle Applications. Refer to [Introduction to the Catalog Structure](#) on page B-2 for more information.

Base descriptors may be created using the action commands: ADD, UPDATE, SYNC, DELETE.

Action commands ADD and UPDATE are internally converted to SYNC. SYNC adds a base descriptor if it is new and updates it if it already exists. If a base descriptor in the file has the same descriptor KEY and the same OWNER name or

key as a base descriptor in the catalog, SYNC updates the descriptor; otherwise, SYNC adds the base descriptor to the catalog.

For detailed information on the default base descriptors that Oracle iProcurement already provides, see [Appendix C](#).

## Required and Validated Root Descriptors Information

The following table describes the required and validated root descriptor fields:

**Table B-3** *Root Descriptors Information*

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<KEY>	Yes	(No default)	Internal identifier for the descriptor. The key must be unique. You cannot change the key once it is specified.	250
<NAME>	Yes, when creating a new descriptor	(No default)	Name of the descriptor that displays to users of Oracle iProcurement. It must be unique.	250
<OWNER> <KEY>	No	0	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag), or both. In the Root Descriptors section, the owner should be 0 or not specified (omit the <OWNER> tag).	250
<OWNER> <NAME>	No	Root Category	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag), or both.	250
<TYPE>	No	Translatable Text	Data type for the descriptor: Text, Translatable Text, or Number. See: <a href="#">Data Types</a> on page B-10. You cannot update the type once it is specified.	—
<DESCRIPTION>	No	(No default)	Description of the descriptor, for your own purposes (does not display online).	700

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<SEARCHRESULTS VISIBLE>	No	0	Indicator of whether the descriptor displays in the search results. Valid values are 0 (for No) or 1 (for Yes).  <b>Note:</b> After the following descriptors, only the first 11 search results visible descriptors in the sequence display in the search results, for space considerations: Thumbnail Image, Description, Long Description, Unit, Unit Price, Currency, Functional Currency Price, and Functional Currency (and Category).	-
<SEQUENCE>	No	-1 (If you do not specify a sequence, Oracle iProcurement displays the descriptors after the default base descriptors that Oracle iProcurement provides.)	If the descriptor is displayed in the search results, the sequence number indicates the descriptor's display sequence on the <b>Search Results Summary, Search Results, Item Detail, and Compare Item</b> pages. Do not use decimals in your sequence numbers. (You can reuse an existing sequence number, if you need to. The descriptor will display next to the one with the same number.)	-
<SEARCHABLE>	No	1	Indicator of whether this descriptor will be searched by the search engine. Valid values are 0 (for No) or 1 (for Yes).	-
<ITEMDETAILVISIB LE>	No	1	Indicator of whether you want this descriptor to display when someone in Oracle iProcurement views the details of an item or compares items. Valid values are 0 (for No) or 1 (for Yes).	-

---

**Tip:** In the Root Descriptors section, omit the OWNER. When OWNER is omitted, the catalog assumes you are creating a base descriptor.

---

## XML Example 5: Creating Base Descriptors

The following is an excerpt from an XML file in which the base descriptor Country of Origin will be added to the catalog.

```
<ROOT_DESCRIPTOR>
  <DESCRIPTOR ACTION="SYNC">
    <KEY>COUNTRY_ORIGIN</KEY>
    <NAME>Country of Origin</NAME>
    <TYPE>Text</TYPE>
    <DESCRIPTION>Where the item originated or was manufactured</DESCRIPTION>
    <SEARCHRESULTSVISIBLE>1</SEARCHRESULTSVISIBLE>
  </DESCRIPTOR>
</ROOT_DESCRIPTOR>
```

## Catalog Data Section

The catalog data section is required and contains one or many item and price sections.

The item section consists of required base descriptors, such as Supplier and Supplier Item Number, and may also include optional base descriptors, such as Manufacturer or Lead Time.

The item section may also be used to create item categories and local descriptors for the categories, if the appropriate profile options described earlier are enabled in Oracle Applications. Creating new categories and descriptors is useful when loading catalogs that are received from an external source, such as Exchange.Oracle.com. It is recommended, however, that this function is controlled using the Catalog Schema DTD. One of the advantages of using the Catalog Schema DTD is that all of your schema information, including base descriptors, browsing categories, and the category hierarchy, is contained in a single file. The Catalog Schema DTD also offers increased flexibility over the Catalog Data DTD for maintaining local descriptors in the catalog. For example, certain tags, such as <TYPE>, can only be defined in the Catalog Schema DTD. If a local descriptor is created from the item section of the Catalog Data DTD, the default for this tag will be Translatable Text and cannot be changed. Please refer to [Appendix C](#) for further instructions and examples on using the Catalog Schema DTD.

The first time an item is added to the catalog, its price information, such as price, unit of measure, and currency, must be included in the item section of the XML file. Any subsequent price modifications should be handled through the price section of the XML file. (Although the item section could be used to maintain price information, doing so will cause performance issues when loading large files. When the XML parser loads the price section, the number of tables accessed is a small subset of the tables accessed when loading the item section of the XML file. For this reason, the item and price sections were designed to function independently of each other.)

## Adding, Updating, and Deleting

Items and prices may be maintained using the action commands: ADD, UPDATE, SYNC, DELETE.

Action commands ADD and UPDATE are internally converted to SYNC. SYNC adds an item or price if it is new and updates it if it already exists. If the following item information in the file is the same as an existing item in the catalog, SYNC updates the item; otherwise, SYNC adds the item to the catalog as a new item:

- SUPPLIER
- SUPPLIER\_PART\_NUM
- BUYER
- SUPPLIER\_PART\_AUXILIARY\_ID

For example, if two items have the same supplier, supplier part number, and buyer, but different supplier part auxiliary ID numbers, these will be separate items in the catalog:

Supplier	Supplier Part Number	Buyer	Supplier Part Auxiliary ID	Description
Acme	3255156	(none specified)	Green	Green T-shirt
Acme	3255156	(none specified)	Red	Red T-shirt

---

**Note:** Assume the same manufacturer is specified for items 3255156 in the example above. If you later update this manufacturer, you need to provide two ITEM lines in the file, one to update the manufacturer for the Green item and one to update the Red.

---

If the following pricing information (also called a price list line) in the file is the same as an existing price list line in the catalog, SYNC updates the pricing information; otherwise, SYNC adds the new pricing to the catalog:

- SUPPLIER
- SUPPLIER\_PART\_NUM
- BUYER

- SUPPLIER\_PART\_AUXILIARY\_ID
- CURRENCY
- SUPPLIER\_SITE

For example, the following three items can coexist in the catalog because they do not all have the same supplier part auxiliary or supplier site:

Supplier	Supplier Part Number	Buyer	Supplier Part Auxiliary ID	Currency	Supplier Site
Acme	123456	Vision Operations	01	USD	San Jose
Acme	123456	Vision Operations	02	USD	San Jose
Acme	123456	Vision Operations	02	USD	Boston

**Note:** If you specify the same item, with the same criteria as described in this section, more than once in the same file, the system processes the last identical entry and rejects the previous ones.

Items on the favorites list are updated by the bulk loader, if the bulk load file includes favorites list items.

## Required and Validated Item Information

The following table describes the required and validated item section fields:

**Note:** The maximum byte lengths given in this document are not necessarily the same as character lengths. For example, 700 Japanese characters will typically be longer than 700 bytes, and a special symbol (though it is a single character), may be more than one byte. Therefore, the actual, byte limits are given below. How these translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

Table B-4 Item Section Fields

Tag/Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
<OWNER> <KEY>	Yes, if NAME is not specified *	(No default)	Item category to which the item belongs. The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. Unless <i>POR: Load Auto Category</i> is set to Yes, the category must be defined in Oracle iProcurement (or mapped to an internal category in Oracle e-Commerce Gateway).	Text	250
<OWNER> <NAME>	Yes, if KEY is not specified *	(No default)	Item category to which the item belongs. The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. Unless <i>POR: Load Auto Category</i> is set to Yes, the category must be defined in Oracle iProcurement.	Text	250
SUPPLIER	Yes	(No default)	The supplier name specified here must match the corresponding supplier name defined in Oracle Applications, including using the same case. +	Text	240
SUPPLIER_ PART_NUM	Yes	(No default)	Supplier item number.	Text	25
SUPPLIER_ PART_ AUXILIARY_ID	No	(No default)	Alternative part number or identifier for the item. For example, you could use this field to show that an item with the same SUPPLIER and SUPPLIER_PART_NUM can be purchased in two different units of measure (UOMs). Requesters would see the item (with the same SUPPLIER_PART_NUM) twice, but with different UOMs.	Text	255
DESCRIPTION	Yes, when adding the item	(No default)	The description of the item or service.	Translatable Text	240

Tag/Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
PRICE	Yes, when adding the item	(No default)	Must be a number greater than or equal to 0, such as 10, 1.99, or 2,000. Must not use any special formatting, such as currency symbols. The system uses the language code in the file to interpret the decimal separator in the number. See: <a href="#">Translating Catalogs</a> on page B-44.	Number	—
UOM	Yes, whenever a PRICE is specified	(No default)	Must be a valid UOM code defined in Oracle Applications.	Text	30
BUYER	Yes, when a SUPPLIER_SITE is specified	All-Buyers	Operating unit defined in Oracle Applications. If an operating unit is not specified here, this item is applicable to all operating units (All-Buyers). If <i>POR: Bulk Load for All Business Groups</i> is set to No, you can enter only an operating unit within your business group. (If it is set to Yes, you can enter any operating unit.) +	Text	700
PRICELIST	No	All-Buyers List Prices <i>or</i> <Operating Unit> Price List	One price list is allowed for each combination of supplier, operating unit (buyer), and currency.  If no operating unit or price list is specified, the bulk loader defaults All-Buyers List Prices for the price list name. If an operating unit is specified, the bulk loader defaults the operating unit name followed by Price List—for example Vision Services Price List.	Text	90
CURRENCY	Yes, when a PRICE is specified	(No default)	Must be a valid currency code defined in Oracle Applications. You cannot update a price list's currency once you create it; however, you can create more than one price list per buyer, each with a different currency. See <a href="#">Price Lists</a> on page B-24.	Text	4

Tag/Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
SUPPLIER_ SITE	No	(No default)	The supplier site must meet the following criteria: <ul style="list-style-type: none"> <li>Match the site name defined for that supplier in Oracle Applications. +</li> <li>Be enabled for the specified operating unit (in the BUYER field). If the BUYER is blank or All-Buyers, the SUPPLIER_SITE must be blank.</li> <li>Be designated a Purchasing site in Oracle Applications.</li> <li>If associated with an Inactive On date, the date must be later than today.</li> </ul>	Text	100
MANUFACTU RER	No	(No default)	Name of the manufacturer of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.)	Translatable Text	240
MANUFACTU RER_ PART_NUM	No	(No default)	Manufacturer-assigned part number of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.)	Text	30
ALIAS	No	(No default)	Alternate description or identifier for each item or service that people can enter when performing a search. For example, an alias for <i>soda</i> might be <i>pop</i> . To enter more than one alias, simply separate each alias with a comma—for example: <i>soda,pop,cola</i> . (This information does not appear on the requisition.)	Translatable Text	700
LONG_ DESCRIPTION	No	(No default)	Detailed description of your item or service. (This information does not appear on the requisition.)	Translatable Text	2000

Tag/Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
PICTURE	No	(No default)	File name of the image that is associated with the item; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i> . Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif (This information does not appear on the requisition.) See: <a href="#">Loading Images</a> on page B-42.	Text	(Same as file name size)
PICTURE_URL	No	(No default)	No longer used. If, however, you used this descriptor in previous releases, you may still use it to provide an image URL. Note that if both PICTURE and PICTURE_URL are specified, PICTURE_URL is ignored.	Text	150
THUMBNAIL_IMAGE	No	(No default)	File name of a smaller, thumbnail image for the item, for displaying on the <b>Search Results Summary, Search Results, and Compare Items</b> pages; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i> . Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif (This information does not appear on the requisition.) See: <a href="#">Loading Images</a> on page B-42.	Text	(Same as file name size)

Tag/Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
ATTACHMENT_URL	No	(No default)	URL at which an attachment for each item or service can be viewed. Include the full URL; for example: <a href="http://www.us.oracle.com/attachment.gif">http://www.us.oracle.com/attachment.gif</a> . On the <b>Item Details</b> page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details)	700
SUPPLIER_URL	No	(No default)	URL for the supplier's Web site. Include the full URL; for example: <a href="http://www.us.oracle.com">http://www.us.oracle.com</a> . On the <b>Item Details</b> page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details)	700
MANUFACTURER_URL	No	(No default)	URL for the manufacturer's Web site. Include the full URL; for example: <a href="http://www.us.oracle.com">http://www.us.oracle.com</a> . On the <b>Item Details</b> page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details)	700
LEAD_TIME	No	(No default)	Amount of time, expressed in days, between the order date and the shipment date. Use any number greater than or equal to 0, such as 7 or 1.5. Seven is invalid. (This information does not appear on the requisition.)	Number	—
ITEM_TYPE	No	(No default)	Indicator of whether the item is a PRODUCT or SERVICE (use capital letters). <b>Note:</b> The ITEM_TYPE is for informational purposes only. There is no relationship between this value and line types specified in Oracle Applications.	Text	—

Tag/Key	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
UNSPSC	No	(No default)	The United Nations Standard Product and Service Code is an open, nonproprietary system of codes and standardized descriptions for classifying goods and services. To view a list of the UNSPSC codes, go to <a href="http://www.ecma.org/unspsc/">http://www.ecma.org/unspsc/</a> . (This information does not appear on the requisition, nor is it validated against existing UNSPSC codes.)	Text	700

\* If the *POR:Load Auto Category* profile option is set to Yes, you should provide both the NAME and KEY. See: [Introduction to the Catalog Structure](#) on page B-2.

+ If you're not sure of the exact name, you can change it later by selecting it from an Oracle Applications list of valid names on the **Specify Options** page just before you bulk load the file. See: [Loading Your XML File](#) on page B-38.

## Required and Validated Price Information

The following table describes the required and validated price section fields:

**Table B-5 Price Section Fields**

Tag	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
<OWNINGITEM> <SUPPLIER>	Yes	(No default)	The supplier must be defined in Oracle Applications and the name specified here must match the corresponding supplier name defined in Oracle Applications, including using the same case. *	Text	240
<OWNINGITEM> <SUPPLIERITEM>	Yes	(No default)	The SUPPLIERITEM must already exist in the catalog (or must already be specified in the ITEM section of the file).	Text	25

Tag	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
SUPPLIER_PART_AUXILIARY_ID	No	(No default)	Alternative part number or identifier for the item. For example, you could use this field to show that an item with the same SUPPLIER and SUPPLIER_PART_NUM can be purchased in two different units of measure (UOMs). Requesters would see the item (with the same SUPPLIER_PART_NUM) twice, but with different UOMs.	Text	255
<SUPPLIER_SITE>	No	(No default)	The supplier site must meet the following criteria: <ul style="list-style-type: none"> <li>Match the site name defined for that supplier in Oracle Applications. *</li> <li>Be enabled for the specified operating unit (in the BUYER field). If the BUYER is blank or All-Buyers, the SUPPLIER_SITE must be blank.</li> <li>Be designated a Purchasing site in Oracle Applications.</li> <li>If associated with an Inactive On date, the date must be later than today.</li> </ul>	Text	100
<BUYER>	Yes, if a SUPPLIER_SITE is specified	All-Buyers	Operating unit defined in Oracle Applications. If an operating unit is not specified here, the price for this item is applicable to all operating units (All-Buyers). If <i>POR: Bulk Load for All Business Groups</i> is set to No, you can enter only an operating unit within your business group. (If it is set to Yes, you can enter any operating unit.) *	Text	700

Tag	Required?	Default	Description and Validation	Data Type	Size (in Bytes)
<PRICELIST>	No	All-Buyers List Prices <i>or</i> <Operating Unit> Price List	One price list is allowed for each combination of supplier, operating unit (buyer), and currency.  If no operating unit or price list is specified, the bulk loader defaults All-Buyers List Prices for the price list name. If an operating unit is specified, the bulk loader defaults the operating unit name followed by Price List—for example Vision Services Price List.	Text	90
<CURRENCY AMOUNT> <AMOUNT>	Yes	(No default)	Must be a number greater than or equal to 0, such as 10, 1.99, or 2,000. Must not use any special formatting, such as currency symbols. The system uses the language code in the file to interpret the decimal separator in the number. See: <a href="#">Translating Catalogs</a> on page B-44.	Number	—
<CURRENCY AMOUNT> <CURRENCY>	Yes	(No default)	Must be a valid currency code define in Oracle Applications. You cannot update a price list's currency once you create it; however, you can create more than one price list per buyer, each with a different currency. See <a href="#">Price Lists</a> on page B-24.	Text	4
<UOM>	Yes	(No default)	Must be a valid UOM code defined in Oracle Applications.	Text	30

\* If you're not sure of the exact name, you can change it later by selecting it from an Oracle Applications list of valid names on the **Specify Options** page just before you bulk load the file. See: [Loading Your XML File](#) on page B-38.

## Price Lists

For a given buyer, supplier, and currency, there can be only one price list; however, you can create more than one price list per buyer if the currencies are different.

For example, the following price lists can coexist because, in the first two price lists, the currencies are different and in the last price list, the operating unit is different:

**Table B-6 Coexisting Price Lists**

Price List Name	Buyer (Operating Unit)	Supplier	Currency
2002 Prices	Vision Services	Oracle	USD
2002 Prices	Vision Services	Oracle	GBP
2002 Prices	Vision Operations	Oracle	USD

The following price lists cannot coexist because the names are different; when uploading the price list 2002 Prices - Revised, Oracle iProcurement detects that a price list already exists for that operating unit, supplier, and currency, and it will not accept a new one:

**Table B-7 Price Lists that Cannot Coexist**

Price List Name	Buyer (Operating Unit)	Supplier	Currency
2002 Prices	Vision Services	Oracle	USD
2002 Prices - Revised	Vision Services	Oracle	USD

## XML Example 6: Adding Items

In this example, two items for the supplier Acme are added to the catalog. Because no specific operating unit (BUYER) is given, the price is visible to all operating units. An item that is visible to all operating units is said to have a general (or list) price.

```
<?xml version="1.0" ?> <!-- version and character set encoding information-->
<CATALOG xml:lang="EN-US"> <!--language identification-->
  <ADMIN> <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>13-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN> <!--end of administrative section-->
```

```

<DATA> <!--start of catalog data section-->
<ITEM ACTION="SYNC"> <!--start of first item, including general price-->
  <OWNER>
    <NAME>Ball Point Pens</NAME> <!--specify category name, key, or both -->
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9001</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>DESCRIPTION</NAME>
    <VALUE>BIC Ball Point Pens, 12 Pack, Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>MANUFACTURER</NAME>
    <VALUE>Bic, Inc.</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>TYPE</NAME> <!--local descriptor key or name for the category Ball
Point Pens-->
    <VALUE>Ball Point</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>INK_COLOR</NAME> <!--local descriptor key or name for the category
Ball Point Pens-->
    <VALUE>Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICE</NAME>
    <VALUE>3.99</VALUE> <!--general price applicable to all operating units-->
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>UOM</NAME>
    <VALUE>DZ</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>CURRENCY</NAME>
    <VALUE>USD</VALUE>
  </NAMEVALUE>

```

```
</ITEM> <!--end of item section for item MW9001-->

<ITEM ACTION="SYNC"> <!--start of second item, including general price-->
  <OWNER>
    <NAME>Ball Point Pens</NAME>
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9002</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>DESCRIPTION</NAME>
    <VALUE>BIC Ball Point Pens, 12 Pack, Red</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>MANUFACTURER</NAME>
    <VALUE>Bic, Inc.</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>TYPE</NAME>
    <VALUE>Ball Point</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>INK_COLOR</NAME>
    <VALUE>Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICE</NAME>
    <VALUE>2.99</VALUE> <!--general price applicable to all operating units-->
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>UOM</NAME>
    <VALUE>DZ</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>CURRENCY</NAME>
    <VALUE>USD</VALUE>
  </NAMEVALUE>
</ITEM> <!--end of item section for item MW9002-->
</DATA> <!--end of catalog data section-->
```

```
</CATALOG> <!--end of catalog-->
```

## XML Example 7: Adding Operating Unit-Specific Items

This example shows how to create operating unit-specific items and prices.

If both this and the previous example are bulk loaded, items MW9001 and MW9002 cost 3.99 and 2.99 USD respectively for all operating units except Vision Operations, where they cost 3.70 and 2.80 EUR respectively. If just this example is bulk loaded, items MW9001 and MW9002 are available only to people in the Vision Operations operating unit, at a cost of 3.70 and 2.80 EUR respectively.

```
<?xml version="1.0" ?> <!-- version and character set encoding information-->
<CATALOG xml:lang="EN-US" > <!--language identification-->
  <ADMIN> <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>13-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN> <!--end of administrative section-->

  <DATA> <!--start of catalog data section-->
    <ITEM ACTION="SYNC"> <!--start of first item, including operating unit
price-->
      <OWNER>
        <NAME>Ball Point Pens</NAME>
        <KEY>BALL_POINT_PENS</KEY>
      </OWNER>
      <NAMEVALUE>
        <NAME>SUPPLIER</NAME>
        <VALUE>Acme</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>SUPPLIER_PART_NUM</NAME>
        <VALUE>MW9001</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>DESCRIPTION</NAME>
        <VALUE>BIC Ball Point Pens, 12 Pack, Blue</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>MANUFACTURER</NAME>
        <VALUE>Bic, Inc.</VALUE>
      </NAMEVALUE>
```

```
<NAMEVALUE>
  <NAME>TYPE</NAME>
  <VALUE>Ball Point</VALUE>
</NAMEVALUE>
<NAMEVALUE>
  <NAME>INK_COLOR</NAME>
  <VALUE>Blue</VALUE>
</NAMEVALUE>
<NAMEVALUE>
  <NAME>PRICE</NAME>
  <VALUE>3.70</VALUE>  <!--operating unit-specific price-->
</NAMEVALUE>
<NAMEVALUE>
  <NAME>UOM</NAME>
  <VALUE>DZ</VALUE>
</NAMEVALUE>
<NAMEVALUE>
  <NAME>CURRENCY</NAME>
  <VALUE>EUR</VALUE>
</NAMEVALUE>
<NAMEVALUE>
  <NAME>BUYER</NAME>
  <VALUE>Vision Operations</VALUE>
</NAMEVALUE>
<NAMEVALUE>
  <NAME>PRICELIST</NAME>
  <VALUE>Vision Operations Prices</VALUE>
</NAMEVALUE>
</ITEM>  <!--end of item section for item MW9001-->

<ITEM ACTION="SYNC">  <!--start of second item, including operating unit
price-->
  <OWNER>
    <NAME>Ball Point Pens</NAME>
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9002</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
```

```
<NAME>DESCRIPTION</NAME>
<VALUE>BIC Ball Point Pens, 12 Pack, Red</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>MANUFACTURER</NAME>
<VALUE>Bic, Inc.</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>TYPE</NAME>
<VALUE>Ball Point</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>INK_COLOR</NAME>
<VALUE>Blue</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>PRICE</NAME>
<VALUE>2.80</VALUE> <!--operating unit-specific price-->
</NAMEVALUE>
<NAMEVALUE>
<NAME>UOM</NAME>
<VALUE>DZ</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>CURRENCY</NAME>
<VALUE>EUR</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>BUYER</NAME>
<VALUE>Vision Operations</VALUE>
</NAMEVALUE>
<NAMEVALUE>
<NAME>PRICELIST</NAME>
<VALUE>Vision Operations Prices</VALUE>
</NAMEVALUE>
</ITEM> <!--end of item section for item MW9002-->
</DATA> <!--end of catalog data section-->
</CATALOG> <!--end of catalog-->
```

## XML Example 8: Updating Prices

In this example, the following updates are made:

- The general price for Supplier Item number MW9001 created in XML Example 6 is updated. Since a BUYER is not specified, this price change affects all operating units except Vision Operations.
- The operating unit-specific price for Supplier Item number MW9001 created in XML Example 7 is updated. This price change affects only the Vision Operations operating unit.
- A new price for MW9001 is added. This new price is visible only in the Vision Operations operating unit. The Vision Operations operating unit now has two prices for MW9001—one for 5.55 and one for 4.00 for any item coming from the Bonn site.

---

**Note:** This example assumes the items were already added to the Vision Operations operating unit using XML Example 7. Use the PRICE element only to update the prices of items that already exist (that were created using the ITEM element). Otherwise, the items will be rejected.

---

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>14-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

  <DATA>
    <PRICE ACTION="SYNC">
      <OWNINGITEM>
        <SUPPLIER>Acme</SUPPLIER>
        <SUPPLIERITEM>MW9001</SUPPLIERITEM>
      </OWNINGITEM>
      <CURRENCYAMOUNT>
        <AMOUNT>5.99</AMOUNT>  <!--increased price to 5.99 USD for all operating
units except Vision Operations -->
        <CURRENCY>USD</CURRENCY>
      </CURRENCYAMOUNT>
      <UOM>DZ</UOM>
    </PRICE>
```

```
<PRICE ACTION="SYNC">
  <OWNINGITEM>
    <SUPPLIER>Acme</SUPPLIER>
    <SUPPLIERITEM>MW9001</SUPPLIERITEM>
  </OWNINGITEM>
  <BUYER>Vision Operations</BUYER>
  <PRICELIST>Vision Operations Prices</PRICELIST>
  <CURRENCYAMOUNT>
    <AMOUNT>5.55</AMOUNT>  <!--changed price for Vision Operations only -->
    <CURRENCY>EUR</CURRENCY>
  </CURRENCYAMOUNT>
  <UOM>DZ</UOM>
</PRICE>

<PRICE ACTION="SYNC">
  <OWNINGITEM>
    <SUPPLIER>Acme</SUPPLIER>
    <SUPPLIERITEM>MW9001</SUPPLIERITEM>
  </OWNINGITEM>
  <BUYER>Vision Operations</BUYER>
  <PRICELIST>Vision Operations Prices</PRICELIST>
  <CURRENCYAMOUNT>
    <AMOUNT>4.00</AMOUNT>  <!--added price for Vision Operations, for the Bonn
site only -->
    <CURRENCY>EUR</CURRENCY>
  </CURRENCYAMOUNT>
  <UOM>DZ</UOM>
  <SUPPLIER_SITE>BONN</SUPPLIER_SITE>
</PRICE>

</DATA>
</CATALOG>
```

## XML Example 9: Updating an Item

In this example, the description and ink color of Supplier Item number MW9001 created in XML Example 6 is updated.

Using both this and the previous examples, this item is updated in all operating units except Vision Operations, since no BUYER is specified. To update the item in Vision Operations, you would need to add another ITEM element to this example for item MW9001, identical to the first ITEM element, except specifying Vision Operations as the BUYER.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <DATE>14-MAR-2003</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>

<DATA>
  <ITEM ACTION="SYNC">
  <OWNER>
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9001</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>DESCRIPTION</NAME>
    <VALUE>BIC Ball Point Pens, 12 Pack, Black</VALUE> <!--changed Blue to
Black-->
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>INK_COLOR</NAME>
    <VALUE>Black</VALUE> <!--changed ink color from Blue to Black-->
  </NAMEVALUE>
  </ITEM>
</DATA>
</CATALOG>

```

## XML Example 10: Deleting an Item

In this example, Supplier Item number MW9002 that was created in XML Example 6 is deleted.

Using both this and the previous examples, this item is deleted in all operating units except Vision Operations, since no BUYER is specified. To delete the item from Vision Operations, you would need to add another ITEM ACTION="DELETE"

element for item MW9002, identical to the first ITEM ACTION="DELETE" element, except specifying Vision Operations as the BUYER.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>13-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

  <DATA>
    <ITEM ACTION="DELETE"> <!--start of item section, deleting the item-->
      <OWNER>
        <KEY>BALL_POINT_PENS</KEY>
      </OWNER>
      <NAMEVALUE>
        <NAME>SUPPLIER</NAME>
        <VALUE>Acme</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>SUPPLIER_PART_NUM</NAME>
        <VALUE>MW9002</VALUE>
      </NAMEVALUE>
    </ITEM>
  </DATA>
</CATALOG>
```

## XML Example 11: Deleting Item Prices

In this example, the operating unit-specific price for Supplier Item number MW9001, last updated in XML Example 8, is deleted. Only the Vision Operations price for the Bonn site is deleted, not the item and not the other list prices or operating unit-specific prices for the item.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>14-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
```

```

</ADMIN>

<DATA>
  <PRICE ACTION="DELETE"> <!--start of price section, deleting price-->
    <OWNINGITEM>
      <SUPPLIER>Acme</SUPPLIER>
      <SUPPLIERITEM>MW9001</SUPPLIERITEM>
    </OWNINGITEM>
    <BUYER>Vision Operations</BUYER>
    <PRICELIST>Vision Operations Prices</PRICELIST>
    <CURRENCYAMOUNT>
      <AMOUNT>4.00</AMOUNT>
      <CURRENCY>EUR</CURRENCY>
    </CURRENCYAMOUNT>
    <UOM>DZ</UOM>
    <SUPPLIER_SITE>BONN</SUPPLIER_SITE>
  </PRICE> <!--end of price section-->
</DATA>
</CATALOG>

```

## Case Sensitivity

Some values are case sensitive and will be considered as updated if their case has changed. All values are case sensitive except the following values:

- Category name and key (for example, Ball Point Pens)
- Descriptor name and key (for example, Ink Color or LEAD\_TIME)
- Unit (for example, EA)
- Supplier Site

For example, you can specify the category as Ball Point Pens or Ball point pens, and they would be treated as the same. Your item would be added to the category Ball Point Pens. But the supplier item number AB457Z would be treated as a different item number than ab457z. The system would add ab457z to the catalog if AB457Z already exists.

Unit is a special case. Oracle Applications is case sensitive; however, if the bulk load file uses BOX, and Oracle Applications uses Box, the item is not rejected. BOX and Box are considered a valid match.

## Reclassifying an Item Under Another Category

If you want to move items formerly under one category, such as Ball Point Pens, to another category, such as Felt Pens, list all of the items under Felt Pens using the SYNC action. (You cannot have the same item in more than one category.)

---

---

**Note:** When you move an item from one category to another, you lose the local descriptors. For example, you originally add an item under the category Felt Pens, using Tip Width and Ink Color as local descriptors. You then move the item to Ball Point Pens. The item will no longer display the Tip Width and Ink Color you specified, even if Ink Color exists in the new category. Local descriptors are specific to each category.

---

---

## Blanking Out a Descriptor

If you want to delete the value for a particular descriptor for an item, blank it out using the text #DEL as shown below. You cannot blank out values for required descriptors or for the SUPPLIER\_PART\_AUXILIARY\_ID. (To delete the SUPPLIER\_PART\_AUXILIARY\_ID for an item, you would need to delete the item and recreate it without the SUPPLIER\_PART\_AUXILIARY\_ID.)

### XML Example 12: Deleting Values

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>15-JAN-2001</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

  <DATA>
    <ITEM ACTION="SYNC">
      <OWNER>
        <KEY>BALL_POINT_PENS</KEY>
      </OWNER>
      <NAMEVALUE>
        <NAME>SUPPLIER</NAME>
        <VALUE>Acme</VALUE>
      </NAMEVALUE>
    </ITEM>
  </DATA>
</CATALOG>
```

```

<NAMEVALUE>
  <NAME>SUPPLIER_PART_NUM</NAME>
  <VALUE>MW9002</VALUE>
</NAMEVALUE>
<NAMEVALUE>
  <NAME>Type</NAME>
  <VALUE>#DEL</VALUE>  <!-- blank out the value -->
</NAMEVALUE>
</ITEM>
</DATA>
</CATALOG>

```

In this example, item MW9002 no longer has a value for Type in the catalog. The Type local descriptor itself still displays, but for item MW9002, no value exists for Type.

## Using the Bulk Loader with Extracted Items

You can use the bulk loader to update any extracted item that has a supplier and supplier part number associated with it. For example, the extractor does not include manufacturer information with the items; however, you could use the bulk loader to specify a manufacturer for an extracted item.

Recall the rules discussed in [Adding, Updating, and Deleting](#) on page B-15. These rules determine whether you are updating an item or creating a new item. For example, if you provide a supplier part auxiliary ID for an extracted item, the bulk loader creates a new item.

---



---

**Note:** In general, you should extract an item first, then bulk load updates to it if desired. If you bulk load the item first, then extract it, the item may not be updated, but may be created as a new item.

---



---

You cannot update the category of extracted items. For extracted items, you can use the bulk loader to change only the following descriptors (in addition to any new descriptors you may have added to the catalog):

- Manufacturer
- Manufacturer Item number
- Description
- Long Description

- Alias
- Attachment URL
- UNSPSC Code
- Availability
- Lead Time
- Item Type
- Image Thumbnail Image
- Supplier URL
- Manufacturer URL

Using the bulk loader, you cannot delete items that were extracted from Oracle Purchasing. To delete items that are considered extracted, delete them in Oracle Applications, then rerun the item extractor.

See [Extracting Catalog Data from Oracle Applications](#) on page 3-16 for more information on the extractor.

## Reviewing and Saving Your XML File

See the tables in the previous sections to be sure that the information in your XML file will validate successfully. Make sure your XML file is formatted properly according to the DTD and examples in this document.

Save your XML file with a .xml extension. You can give the file any name. (If you left the NAME in the ADMIN section blank, the bulk loader stores the file name in the system.)

## Loading Your XML File

Once you have created and reviewed your XML file, load it to Oracle iProcurement as follows:

1. Use the iProcurement Catalog Administration responsibility to access the eContent Manager home page.
2. In the navigation bar on the left, click "Bulk Load Items & Price Lists."
3. In the File Name field, enter either the file name and path, or click Browse to navigate to your XML file.

4. Under Choose a File, File Type, select XML.
5. If you would like to replace certain values, such as Supplier and Supplier Site, in your catalog file, click Specify Options and do the following:
  - Select a Supplier if you wish to replace the SUPPLIER specified in the file.
  - Select an Operating Unit for which the items in the file are applicable.
  - Select a Supplier Site\* to load these items for a particular Supplier Site. Oracle iProcurement displays only the list of sites valid for that operating unit and supplier.
  - You may optionally select a Contract Purchase Agreement\* that is applicable to all items in the file. Oracle iProcurement retrieves this list of valid agreements from Oracle Purchasing, for the Operating Unit and Supplier you chose. (If you also chose a Supplier Site, Oracle iProcurement displays only a list of agreements valid for that site.)

---

---

**Note:** The Contract Purchase Agreement Description is a display-only field that defaults the description associated with the agreement.

---

---

\* This option is only available when you select an Operating Unit and Supplier.

6. Click Start Load Now to send your file.

As soon as the load is started, the screen displays the Bulk Load Confirmation message and job number.

To check the status of your job, click View Load Status on the job confirmation page.

The View Bulk Load Status page tells you the status of your entire job:

- Pending (waiting to be processed)
- Running (processing the file)
- Completed
- Completed with Errors (loaded the file, but rejected some of the lines)
- Failed (encountered a format or encoding error)

Large files may take some time to load. You do not need to remain logged in while your job completes. If you need, click the Refresh or Reload button on your browser to update the status.

As an alternative to the **View Bulk Load Status** page, you can also view bulk load jobs in Oracle Applications:

1. In Oracle Applications, in the Oracle Purchasing or System Administration responsibilities, navigate to the View Requests window as follows:

From Oracle Purchasing: Requests

From System Administration: Requests > View

2. In the Find Requests window, choose to find all requests or enter a specific Request ID, Name, or other information.

The bulk load number assigned to your bulk load job in the eContent Manager is the same as the Request ID. The request name is Catalog Bulk Load - Items & Price Lists.

3. You may be able to see more details about the bulk load and errors using the View Log button. (After you choose View Log, you may need to use the Next button to page through the entire log.)

If you still cannot determine the cause of an error using the log, temporarily set the profile option *POR: Set Debug Catalog Loader ON* to Yes with Detail and bulk load the file again. Setting this profile option to Yes or Yes with Detail displays a more detailed log of the bulk load process for that job. (This profile option should be set to Yes or Yes with Detail only while troubleshooting.)

---

---

**Note:** If you are not the same user who submitted the job, the View Log button is disabled.

---

---

## Resolving Errors

The **View Bulk Load Status** page alerts you to failures or rejected lines in your XML file. Oracle iProcurement looks for errors in your file in two phases: format errors and validation errors.

### Format errors (failures)

Format errors occur when the XML file fails validation against the DTD. Some examples of format errors include special characters in your file that are not covered by the character set specified in the `<?xml version="1.0" ?>` element, or a syntactic error such as forgetting to end the administrative section with `</ADMIN>`. If a format error is encountered, the load process stops, and a Failed status is returned.

If your job fails, fix the file and resubmit it for processing.

## Validation errors (rejected lines)

Once format errors, if any, are resolved, Oracle iProcurement checks for validation errors. Validation errors occur when information that you entered in your XML file does not match corresponding information already held within Oracle iProcurement or Oracle Applications. For example, if you enter values for UOM or CURRENCY that Oracle Applications does not recognize, a validation error will occur. The individual <ITEM> or <PRICE> elements on which the validation errors occurred will be rejected.

If your job completes with errors, either select the job and click View Rejected Lines or click the link in the Rejected Lines column to view the errors. Fix the file and resubmit it for processing.

## Handling Special Characters

If you want to include special characters (such as &, or <>) in your XML file, use the CDATA tag as follows:

```
<NAMEVALUE>
  <NAME>DESCRIPTION</NAME>
  <VALUE><![CDATA[Pen & Pencil Gift Set]]></VALUE>
</NAMEVALUE>
```

Alternatively, use HTML character sequences, such as &amp; for ampersand (&) or &lt; for less than (<):

```
<NAMEVALUE>
  <NAME>Description</NAME>
  <VALUE>Pen &amp; Pencil Gift Set &lt; -- Special Values</VALUE>
</NAMEVALUE>
```

Use the CDATA tag only for special characters. For accents or other language-specific characters, you must use the proper encoding. See [Version and Character Set Encoding](#) on page B-5.

---

---

**Note:** If you use HTML character sequences, requesters cannot search on the special characters. For example, if the requester enters the trademark symbol (™) in the Search field, the search engine finds matching items if you used the symbol itself in the file (accompanied by the proper encoding). If you used the HTML character sequence for the symbol, requesters will not find the matching items by entering ™.

---

---

## Loading Images

You can specify or load two kinds of images for items:

- Images that display on the **Item Details** page when requesters view the details of an item. (Use the Image field in the bulk load file.)
- Smaller, thumbnail versions of the images that display on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. (Use the Thumbnail Image in the bulk load file.)

For a complete overview of image management, including recommendations on thumbnail image sizes, see [Managing Images](#) on page 3-50.

There are two ways to associate items with images in your bulk load file:

- Copy the images to the local server and indicate the image file names in the XML file.
- Reference the URLs of the images in the XML file.

To copy the images to the local server:

1. For the *POR: Hosted Images Directory* profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA\_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA\_MEDIA directory.

2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Use the <NAMEVALUE> tags within the item section of your XML file.

For example, to specify an image for the **Item Details** page:

<NAMEVALUE>

```

        <NAME>PICTURE</NAME>
        <VALUE>bluepen.gif</VALUE>
    </NAMEVALUE>

```

To specify a thumbnail image for the search results and comparison pages:

```

<NAMEVALUE>
    <NAME>THUMBNAIL_IMAGE</NAME>
    <VALUE>bluepen_thumb.gif</VALUE>
</NAMEVALUE>

```

---



---

**Note:** The file name for the image is case sensitive. For example, if the image file name is bluepen.gif, but you specify BluePen.gif in the Image field, the image will not display.

---



---

#### 4. Load your XML file.

To specify the URL of the image that resides on the Internet:

1. Obtain the full path of the image (for example, <http://www.oracle.com/toplogo2.gif>).
2. Use the <NAMEVALUE> tags within the item section of your XML file.

For example, to specify an image for the **Item Details** page:

```

<NAMEVALUE>
    <NAME>PICTURE</NAME>
    <VALUE>http://www.oracle.com/logo.gif</VALUE>
</NAMEVALUE>

```

To specify a thumbnail image for the search results and comparison pages:

```

<NAMEVALUE>
    <NAME>THUMBNAIL_IMAGE</NAME>
    <VALUE>http://www.oracle.com/logo_thumb.gif</VALUE>
</NAMEVALUE>

```

#### 3. Load your XML file.

If you specify both an image URL (using the old PICTURE\_URL field) and a server image (using PICTURE) for an item, Oracle iProcurement displays the server image.

---

---

**Note:** Instead of creating separate detailed and thumbnail images, you could use the same image file name or URL for both the Image and Thumbnail Image fields. Then set either the *POR: Thumbnail Width* or *POR: Thumbnail Height* profile option to resize the image for thumbnails. For instructions, see [Managing Images](#) on page 3-50.

---

---

## Translating Catalogs

You can load your catalog items in any or all of the languages that Oracle iProcurement supports. The language you specify in your file must be installed in the Oracle iProcurement database.

When you add an item to the catalog, it is added only in the language specified at the beginning of your XML file. To provide your catalog items in another language, translate the XML file and load it again specifying the supported language and the action command SYNC.

When you delete an item, specifying an action of DELETE, the item is deleted for all languages installed in the Oracle iProcurement database.

When an item is created in another language, only the translatable descriptors (those with a Translatable Text data type) must be specified in the XML file (along with minimally required values). All of the non-translatable descriptors, such as Manufacturer Item number, are automatically inherited from the original language in which the item was created. If you change the value of a non-translatable descriptor when loading the translated file, the change will appear in all languages installed in the Oracle iProcurement database. Only translatable descriptors can vary by language. For example, if you change the Manufacturer Item number in one language, it is changed in all languages; however, when you change the item's Description, it is changed only in the language specified in the file.

Load your catalog items in one language at a time. For example, load your catalog items in English, using the "EN-US" language code, then translate and load that catalog file in French using the "FR-FR" language code.

The information that is needed to translate an item includes:

- SUPPLIER (for validation purposes) - required
- SUPPLIER\_PART\_NUM (for validation purposes) - required
- Category (using the <OWNER> tag) (for validation purposes) - required

- SUPPLIER\_PART\_AUXILIARY\_ID (for validation purposes) - required if the item you are translating has a SUPPLIER\_PART\_AUXILIARY\_ID. The SUPPLIER\_PART\_AUXILIARY\_ID is used to uniquely identify an item.
- Item DESCRIPTION (for validation purposes and translation, if applicable) - required when adding an item for the first time to any language
- Descriptors whose TYPE=Translatable Text, if applicable - optional

## Categories and Descriptors

As with any catalog items you load into the catalog, the category name or key and local descriptor name or key in your translated file must match exactly those given in the foreign language catalog. The key will be the same in all languages, but its name may be different. When translating your items, you may reference either the category name in that language or the category key. In the following example, the category key in all languages is Ball Point Pens, but the category name in Spanish is Bolígrafos:

Tag	EN-US	ES-ES
<NAME>	Ball Point Pens	Bolígrafos
<KEY>	Ball Point Pens	Ball Point Pens

The same is true for local descriptors, such as Ink Color and any base descriptor. For example, the key for the supplier item number is always SUPPLIER\_PART\_NUM, but the name, Supplier Item, will vary across languages. You may reference either the name (in the specified language) or the key.

## Pricing

Pricing does not need to be included in the translated file. When an item is translated to another language, its pricing is also automatically copied over to that language. You could omit the pricing information in your translated file.

As with all non-translatable descriptors, if you change the pricing information in one language, it is changed in all languages. For example, you bulk load an item that costs 2 USD, specifying EN-US (English) in the file. Later, you change EN-US to FR-FR (French) and change the price from 2 USD to 4 USD. The price is changed in all languages.

In another example, you publish an EN-US (English) file with USD prices for Operating Unit A; you then create a FR-FR (French) version of that catalog file,

changing the pricing from USD to FRF, for Operating Unit A. In this example, Oracle iProcurement now has two price lists, one in USD and one in FRF, for Operating Unit A, and the people in Operating Unit A see prices in those two currencies. If, however, you publish USD prices only for Operating Unit A and FRF prices only for Operating Unit B, then people in those operating units see only their prices. Price list currencies are independent of language.

The system uses the language code specified in your file to determine the decimal separator in a number. For example, if you specify American English (EN-US) in the file, the system interprets periods as decimal separators. If you specify German (DE-DE) in the file, the system interprets commas as decimal separators. The following table shows some examples:

**Table B-8 Example Prices and Languages**

Language in Bulk Load File	Price in Bulk Load File	Displayed Price when <i>ICX: Numeric characters</i> is .,	Displayed Price when <i>ICX: Numeric characters</i> is ,.
EN-US	2,000	2,000.00	2.000,00
DE-DE	2,000	2.00	2,00
EN-US	10000.00	10,000.00	10.000,00
DE-DE	10000.00	1,000,000.00	1.000.000,00

**Note:** Decimal separators are influenced by the profile option *ICX: Numeric characters* in Oracle Applications. If this profile option is set to use periods as decimal separators, then the decimal separator that requesters see is a period regardless of their language. The bulk loader still uses the language code in the file to determine where the decimal separator is placed. The profile option determines how the price displays to requesters. (If the profile option *ICX: Numeric characters* is not set, Oracle iProcurement uses the `nls_numeric_` parameters database setting to determine how to display the price.)

### Example 13: Translating an XML File

In this example, Supplier Item number MW9001 created in XML Example 6 will be translated to Spanish.

```
<?xml version="1.0" encoding="ISO-8859-1" ?> <!-- version and character set
```

```
encoding information-->
<CATALOG xml:lang="ES-ES"> <!--language identification-->
  <ADMIN> <!--start of administrative section-->
    <NAME>Material de Oficina</NAME>
    <INFORMATION>
      <DATE>30-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

  <DATA> <!--start of catalog data section-->
    <ITEM ACTION="SYNC"> <!--Action must be SYNC -->
      <OWNER>
        <KEY>BALL_POINT_PENS</KEY> <!--key is non-translatable (same in all
languages)-->
          <NAME>Bolígrafos</NAME>
        </OWNER>
        <NAMEVALUE>
          <NAME>SUPPLIER_PART_NUM</NAME>
          <VALUE>MW9001</VALUE>
        </NAMEVALUE>
        <NAMEVALUE>
          <NAME>SUPPLIER</NAME>
          <VALUE>Acme</VALUE>
        </NAMEVALUE>
        <NAMEVALUE>
          <NAME>DESCRIPTION</NAME>
          <VALUE>Tinta azul, punta fina</VALUE>
        </NAMEVALUE>
        <NAMEVALUE>
          <NAME>TYPE</NAME> <!--key for the local descriptor Type-->
          <VALUE>Punta fina</VALUE>
        </NAMEVALUE>
        <NAMEVALUE>
          <NAME>INK_COLOR</NAME> <!--key for the local descriptor Ink Color-->
          <VALUE>Azul</VALUE>
        </NAMEVALUE>
      </ITEM>
    </DATA>
  </CATALOG>
```

## Backwards Compatibility

The release of Oracle iProcurement Patchset I introduced two XML loaders—one for loading schema and the other for loading data. However, in previous releases of Oracle iProcurement, only one loader was used for both schema and data. To support catalog files that were created for earlier releases of Oracle iProcurement where the schema and data coexisted in a single file, both of the new loaders have been modified. These modifications eliminate any need to manually manipulate the catalog files.

When a catalog file is submitted through the "Bulk Load Items & Price Lists" link, the Schema and Hierarchy sections are ignored. When a catalog file is submitted through the "Bulk Load Schema" link, the Contracts, Root\_Descriptors and Data sections are ignored.

To successfully load a catalog that was created in an older release of Oracle iProcurement, perform the following steps:

1. Navigate to the "Bulk Load Schema" link to load the catalog schema that is in the file.
2. Navigate to the "Bulk Load Items & Price Lists" link to load the catalog data that is in the file.

Please refer to [Appendix C](#) for further information regarding bulk loading catalog schema including the validations of the Schema and Hierarchy sections.

---

# Using XML to Load Catalog Schema

This document covers the following topics:

- [Introduction to the Catalog Structure](#) on page C-2
- [Using XML to Load the Catalog Schema](#) on page C-3
- [Version and Character Set Encoding](#) on page C-4
- [Language Identification](#) on page C-4
- [Administrative Section](#) on page C-6
- [Schema Section](#) on page C-8
- [Required and Validated Category Information](#) on page C-9
- [Required and Validated Descriptors Information](#) on page C-10
- [Hierarchy Section](#) on page C-21
- [Reviewing and Saving Your XML File](#) on page C-26
- [Loading Your XML File](#) on page C-26
- [Resolving Errors](#) on page C-28
- [Handling Special Characters](#) on page C-28
- [Translating Catalog Schema](#) on page C-29
- [Backwards Compatibility](#) on page C-31

This document explains how to create and load your catalog schema into Oracle iProcurement's catalog using the XML interface described in this document. The descriptors, categories and their relationships that you upload will display to Oracle iProcurement users when they search the catalog. The XML file that is used to load this information into Oracle iProcurement can be generated in a text editor,

commercial XML generator program, or an XML generator program that you write yourself.

You can use any combination of online editing and XML files to maintain your catalog structure. You are not restricted to using one method or the other. For example, if you load your initial categories and descriptors using XML, you can add to or change them using the **Edit Schema** page, accessible through the eContent Manager in Oracle iProcurement.

This document is also available as a downloadable Readme file from the **Download Resources** page in the eContent Manager (when you log in with the iProcurement Catalog Administration responsibility). For subsequent releases of Oracle iProcurement, always check the Readme file in the eContent Manager for the latest information.

## Introduction to the Catalog Structure

At a high level, there are two areas that define the catalog—the catalog data and the catalog schema.

Catalog data consists of the items and services available for purchase. The associated prices for these items and services are also considered part of the catalog data.

Catalog schema is comprised of a combination of categories, local descriptors (sometimes known as category attributes) used to describe items in a specific category, and base descriptors (sometimes known as base attributes) used to describe any item or service in the catalog.

There are two types of categories in the catalog. Together, these categories define the hierarchy:

- Item categories, also known as genus categories, are used to group similar items. Item categories are found at the lowest level of the category hierarchy; therefore an item category can never be a parent category to a child category. Every item in the catalog must belong to an item category.
- Browsing categories, also known as navigation categories (or master or intermediate level categories), are used to define the levels of the category hierarchy. These types of categories can be either a parent or child to another category, but cannot contain any items.

Local descriptors apply only to items within a specific item category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Local descriptors can vary from one item category to another, and they are always optional.

Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. Some base descriptors, such as Supplier Item number, are required; others, such as Manufacturer, are optional.

## Using XML to Load the Catalog Schema

Catalog schema loaded into the catalog is divided into three main sections:

1. Admin (required): Used to identify the catalog.
2. Schema (optional): Used to define categories, local descriptors, and base descriptors.
3. Hierarchy (optional): Used to define category relationships, also known as the category hierarchy or, online in Oracle iProcurement, as the Table of Contents.

Your XML file can consist of just categories, just descriptors, just relationships, or any combination of the three. Categories and descriptors must be defined first (in any order), then hierarchy relationships.

There are two additional sections, Root\_Descriptors and Data, that are used solely for supporting catalog files created for previous releases of Oracle iProcurement. New catalog files should not contain these two sections. For more information, see: [Backwards Compatibility](#) on page C-31.

## The Catalog Schema Document Type Definition (DTD)

A Document Type Definition (DTD) is a formal definition, or summary, of the requirements of a particular XML file. This DTD will help you structure your XML file. However, you can also use the example XML files in this document to help you create your XML file.

Your XML file must conform to the following World Wide Web Consortium (W3C) specifications:

- The W3C recommendation for Extensible Markup Language (XML) 1.0 at <http://www.w3.org/TR/2000/REC-xml-20001006>
- The W3C proposed recommendation for Namespaces in XML at <http://www.w3.org/TR/1999/REC-xml-names-19990114>
- The xml:lang attribute as described in Language Identification.

The Catalog Schema DTD is provided in the Zip resources download. The DTD also exists in the \$OA\_HTML directory (or corresponding directory based on your platform). The DTD file name is CatalogSchema.dtd.

## Version and Character Set Encoding

Every XML file must contain a line that indicates the version of XML you are using and any special encoding (or character set) you are using within the file. The version should always be 1.0. If your item descriptions and other catalog data use basic alphanumeric characters (a-z, AZ, 0-9, or any character with an ASCII code between 0 and 127), or if you used a UTF-8 editor to edit the file, you do not need to specify the encoding, so the beginning of your XML file can look like this:

```
<?xml version="1.0" ?>
```

When no document encoding is specified, UTF-8 is assumed.

If you are not using a UTF-8 editor and your catalog content includes special characters (such as the copyright or registered trademark symbols), accented characters (for example, é), or any characters that have a binary representation greater than 127, you must specify the character set in which your editor saves the file. For example, if you are creating the file in Spanish, using an ISO-8859-1 editor that supports Spanish characters, then you should also enter an encoding of ISO-8859-1 in your XML file, as follows:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
```

The system uses the encoding you specify in your XML file to "read" the contents of the file. If this encoding does not support the characters in the file nor matches the encoding in which the file was saved, the system produces an error and rejects the file with a Failed status.

Specify the encoding using the Internet Assigned Numbers Authority (IANA) registered character set names. A list of registered character sets is available from IANA at the following URL: <http://www.iana.org/assignments/character-sets>

## Language Identification

The XML documents that you submit must support language specifications using the `xml:lang` attribute as described in the Extensible Markup Language (XML) 1.0 W3C recommendation (visit <http://www.w3.org/TR> for all published and draft recommendations).

The following, extracted from the XML 1.0 specification, describes how language is identified.

LanguageID ::= Langcode (- Subcode)\*

LangCode ::= ISO639Code

According to the specification, the Langcode must be a two-letter language code as defined by ISO 639, Codes for the representation of the names of languages. Obtain a full list of these codes at the following site:

<http://www.ics.uci.edu/pub/ietf/http/related/iso639.txt>.

The Subcode must be a country code from ISO 3166, Codes for the representation of names of countries. Obtain a full list of these codes at

[http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/en\\_listp1.html](http://www.din.de/gremien/nas/nabd/iso3166ma/codlstp1/en_listp1.html).

For example, the following illustrates setting the language to English and the country to the United States:

```
<CATALOG xml:lang="EN-US">
```

The language you specify must be installed in the Oracle iProcurement database.

For more information on providing translations for catalog content, see: [Translating Catalog Schema](#) on page C-29.

The Oracle iProcurement catalog supports the following language code and territory code combinations, if the corresponding language is installed:

**Table C-1 Valid Language and Territory Codes**

Language	Language Code	Territory Code
American English	EN	US
Arabic	AR	AE
Brazilian Portuguese	PT	BR
British English	EN	GB
Bulgarian	BG	BG
Canadian French	FR	CA
Catalan	CA	CT
Croatian	HR	YU
Czech	CZ	CZ
Danish	DA	DK
Dutch	NL	NL
Egyptian	EG	EG
Finnish	FI	FI

<b>Language</b>	<b>Language Code</b>	<b>Territory Code</b>
French	FR	FR
German	DE	DE
Greek	EL	GR
Hebrew	IW	IL
Hungarian	HU	HU
Icelandic	IS	IS
Italian	IT	IT
Japanese	JA	JP
Korean	KO	KR
Latin American Spanish	ES	MX
Lithuanian	LT	LT
Norwegian	NO	NO
Polish	PL	PL
Portuguese	PT	PT
Romanian	RO	RO
Russian	RU	SU
Simplified Chinese	ZH	CN
Slovak	SK	SI
Slovenian	SL	SI
Spanish	ES	ES
Swedish	SV	SE
Thai	TH	TH
Traditional Chinese	ZH	TW
Turkish	TR	TR

## **Administrative Section**

This section is required and is used to identify the catalog.

## Required and Validated Administrative Information

The following table describes the required administrative section fields:

---



---

**Note:** The maximum byte lengths given in this document are not necessarily the same as character lengths. For example, 700 Japanese characters will typically be longer than 700 bytes, and a special symbol (though it is a single character), may be more than one byte. Therefore, the actual, byte limits are given below. How these translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

---



---

**Table C-2 Administration Section Fields**

Tag	Required?	Default Value	Description and Validation
<NAME>	Yes	(No default)	Name used to identify your file, for your own purposes. There is no validation performed on this value. The limit is 250 bytes.
<DATE>	Yes	(No default)	Date of creation or modification. Use a date format of your choice; there is no validation performed on this value.
<SOURCE>	Yes	(No default)	Author of the XML document. Can be a person, company, or tool. There is no validation performed on this value.

## XML Example 1: Entering Administrative Information

```
<ADMIN>
  <NAME>Vision Operations</NAME>
  <INFORMATION>
    <DATE>08-DEC-2002</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>
```

## XML Example 2: Entering Administrative Information <ADMIN>

```
<ADMIN>
<NAME>Vision Operations</NAME>
<INFORMATION>
  <SOURCE>Acme</SOURCE> <!--SOURCE and DATE are interchangeable-->
  <DATE>08-DEC-2002</DATE>
</INFORMATION>
</ADMIN>
```

## Schema Section

The schema section is optional and contains one or many category or descriptor sections.

The category section is used to define both item and browsing categories. While the relationships between these types of categories are established in the hierarchy section of the XML file, some of the actions that can be performed in the category section affect the hierarchy. For example, if a browsing category is deleted through the schema section, all of its child categories will be disconnected from the hierarchy. (See [XML Example 11: Deleting a Browsing Category](#) on page C-25.)

The descriptors section is used to define base and local descriptors. For example, you can use tags to specify whether the descriptor is searchable or visible when viewing item details. If these tags are not included in an XML file, the defaults will be applied to the descriptor. For example, the default value for searchable is Yes.

Categories and descriptors may be maintained using the action commands ADD, UPDATE, SYNC, or DELETE. Action commands ADD and UPDATE are internally converted to SYNC. The SYNC action adds the specified category or descriptor if it is new and updates it if it already exists.

To determine whether to add or update a category when you use SYNC, Oracle iProcurement matches the category KEY. When the category KEY in your XML file matches the category KEY in the catalog, the category in the catalog is updated with the information provided in your XML file. Otherwise, the category is added to the catalog.

To determine whether to add or update a descriptor when you use SYNC, Oracle iProcurement matches the descriptor KEY and the OWNER name or key. When the KEY and OWNER in your XML file matches the KEY and OWNER in the catalog, the descriptor in the catalog is updated with the information provided in your XML file. Otherwise, the descriptor is added to the catalog.

---

---

**Note:** Using the schema bulk load file, you cannot use the action command DELETE to delete an item category if it contains items. You must first remove the items, either by deleting them or moving them to a new category, before you can delete the category. (Online, using the **Edit Schema** page, you can delete categories that contain items.)

You cannot delete the default base descriptors that Oracle iProcurement provides. (See: [Default Base Descriptors](#) on page C-13.)

---

---

---

---

**Attention:** If you delete a descriptor, you are also deleting that information from the items themselves in the catalog. For example, if you delete the Ink Color descriptor from the category Pens, all items in that category will no longer display the ink color. If you delete a base descriptor, all items in the catalog will no longer display that descriptor. If you delete a descriptor and want to add it back, you can use the same name and key (if you want). Note that adding back a descriptor does not add back its values. For example, once you delete Ink Color, the values for Ink Color (such as blue or black) do not return when you add Ink Color back.

---

---

The Oracle iProcurement catalog supports the following:

- A maximum of 150 local descriptors per category, no more than 50 per type: 50 Text descriptors, 50 Translatable Text descriptors, and 50 Number descriptors.
- A maximum of 300 total base descriptors, no more than 100 per Text, Translatable Text, or Number types.
- Any number of item and browsing categories. (The more browsing categories you have, the longer the **Build Table of Contents** page in the eContent Manager may take to display.)

## Required and Validated Category Information

The following table describes the required category section fields:

**Table C–3 Category Fields**

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<KEY>	Yes	(No default)	Internal identifier for the category. They key must be unique. You cannot change the key once it is specified. The key can be the same as the NAME, and can contain spaces.	250
<NAME>	Yes, when creating a new category	(No default)	Name of the category that displays to users of Oracle iProcurement. It must be unique.	250
<TYPE>	No	GENUS	To specify the category as a browsing category, use the type NAVIGATION. To specify the category as an item category, use the type GENUS. You cannot change the type once it is specified.	—
<DESCRIPTION>	No	(No default)	Description of the category, for your own purposes (does not display to requesters online).	700

Remember that new categories you create must be mapped to categories in Oracle Applications to successfully create requisitions for items in that category. See the online Help in the eContent Manager (accessible through the iProcurement Catalog Administration responsibility) for more information on mapping.

## Required and Validated Descriptors Information

The following table describes the required descriptors section fields:

**Table C–4 Descriptor Fields**

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<KEY>	Yes	(No default)	Internal identifier for the descriptor. The key must be unique. You cannot change the key once it is specified. The key can be the same as the NAME, and can contain spaces.	250

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<NAME>	Yes, when creating a new descriptor	(No default)	Name of the descriptor that displays to users of Oracle iProcurement. For local descriptors, the name must be unique within its category (<OWNER>) and must not be the same as a base descriptor name. For base descriptors, the name must be unique within the catalog.	250
<OWNER> <KEY>	No	0	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. When defining local descriptors, the owner is the category. If no owner is specified, or if you specify 0, the descriptor will be created as a base descriptor.	250
<OWNER> <NAME>	No	Root Category	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both.	250
<TYPE>	No	Translatable Text	Data type for the descriptor: <ul style="list-style-type: none"> <li>■ Text: numbers or text that display the same in all languages and cannot be translated.</li> <li>■ Translatable Text: numbers or text that can vary by language, if you translate them.</li> <li>■ Number: positive or negative number, with or without decimals.</li> </ul> You cannot update the type once it is specified.	—
<DESCRIPTION>	No	(No default)	Description of the descriptor, for your own purposes (does not display online).	700

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<SEARCH RESULTSVISIBLE>	No	0	<p>Indicator of whether the descriptor displays in the search results. Valid values are 0 (for No) or 1 (for Yes). Local descriptors are displayed to requesters only when accessed by browsing categories online.</p> <p><b>Note:</b> After the following descriptors, only the first 11 search results visible descriptors in the sequence display in the search results, for space considerations: Thumbnail Image, Description, Long Description, Unit, Unit Price, Currency, Functional Currency Price, and Functional Currency (and Category).</p>	—
<SEQUENCE>	No	-1 (If you do not specify a sequence, Oracle iProcurement displays the descriptors after the default base descriptors that Oracle iProcurement provides.)	<p>If the descriptor is displayed in the search results, the sequence number indicates the descriptor's display sequence on the <b>Search Results Summary</b>, <b>Search Results</b>, <b>Item Detail</b>, and <b>Compare Item</b> pages. Local descriptors are displayed to requesters only when accessed by browsing categories online. See: <a href="#">Default Base Descriptors</a> on page C-13, for information on existing descriptor sequences. Do not use decimals in your sequence numbers. (You can reuse an existing sequence number, if you need to. The descriptor will display next to the one with the same number.)</p>	—
<SEARCHABLE>	No	1	<p>Indicator of whether this descriptor will be searched by the search engine. Valid values are 0 (for No) or 1 (for Yes).</p>	—
<ITEMDETAILVISIBLE>	No	1	<p>Indicator of whether you want this descriptor to display when someone in Oracle iProcurement views the details of an item or compares items. Valid values are 0 (for No) or 1 (for Yes).</p>	—

**Tip:** If you want to create a base descriptor, omit the OWNER. When OWNER is omitted, the catalog assumes you are creating a base descriptor.

## Default Base Descriptors

The following table provides information on the default base descriptors that Oracle iProcurement provides and their default values. Some of the descriptors listed below are not used when bulk loading catalog items, yet are part of the descriptor sequence in Oracle iProcurement.

**Table C-5 Default Descriptor Information (Sequenced View)**

Descriptor	SEQUENCE	SEARCHRESULTS VISIBLE	ITEMDETAILVISIBLE	SEARCHABLE
Thumbnail Image	1 *	1 (Yes)	1 (Yes, on the Compare Items page)	0 (No) *
Description	2	1 (Yes)	1 (Yes)	1 (Yes)
Supplier	3	1 (Yes)	1 (Yes)	1 (Yes)
Supplier Site	4	1 (Yes)	1 (Yes)	0 (No) *
Supplier Item	5	1 (Yes)	1 (Yes)	1 (Yes)
Supplier Part Auxiliary ID	6	0 (No)	1 (Yes)	1 (Yes)
Internal Item Number <sup>+</sup>	7	1 (Yes)	1 (Yes)	1 (Yes)
Image	7	0 (No) *	1 (Yes)	0 (No) *
Manufacturer	8	0 (No)	1 (Yes)	1 (Yes)
Manufacturer Item	9	0 (No)	1 (Yes)	1 (Yes)
Unit	10	1 (Yes)	1 (Yes)	0 (No) *
Unit Price	11	1 (Yes)	1 (Yes)	0 (No) *
Currency	12	1 (Yes)	1 (Yes)	0 (No) *
Functional Currency Price <sup>+</sup>	13	1 (Yes)	1 (Yes)	0 (No) *
Functional Currency <sup>+</sup>	14	1 (Yes)	1 (Yes)	0 (No) *
Availability	15	0 (No)	1 (Yes)	0 (No)
Lead Time	16	0 (No)	1 (Yes)	0 (No) *

Descriptor	SEQUENCE	SEARCHRESULTS		
		VISIBLE	ITEMDETAILVISIBLE	SEARCHABLE
UNSPSC Code	17	0 (No)	1 (Yes)	1 (Yes)
Item Type	18	0 (No)	1 (Yes)	0 (No)
Operating Unit (Buyer)	19	0 (No) *	0 (No) *	0 (No) *
Contract Number	20	0 (No)	1 (Yes)	0 (No) *
Contract Line	21	0 (No)	0 (No)	0 (No) *
Pricelist	22	0 (No) *	0 (No) *	0 (No) *
Alias	23	0 (No)	0 (No)	1 (Yes)
Comments	24	0 (No)	0 (No)	0 (No)
Long Description	25	1 (Yes)	1 (Yes)	0 (No)
Attachment URL	26	0 (No) *	1 (Yes)	0 (No) *
Supplier URL	27	0 (No)	1 (Yes)	0 (No) *
Manufacturer URL	28	0 (No)	1 (Yes)	0 (No) *
Image URL	30	0 (No) *	0 (No)	0 (No) *

\* You should not modify these properties.

+ Although you can change some of the properties for these descriptors, you cannot add or update values for them when bulk loading items.

The following table shows the same information as [Table C-5](#) above, isolating descriptors that are SEARCHRESULTSVISIBLE by default:

**Table C-6 Default Descriptor Information (Visible in Search Results)**

Descriptor	SEQUENCE
Thumbnail Image	1
Description	2
Supplier	3
Supplier Site	4
Supplier Item	5
Internal Item Number	7

<b>Descriptor</b>	<b>SEQUENCE</b>
Unit *	10
Unit Price	11
Currency	12
Functional Currency Price *	13
Functional Currency *	14
Long Description *	25

\* The order in which these are displayed in the search results cannot be controlled by the sequence number.

The following table shows the same information as [Table C-5](#) above, isolating descriptors that are ITEMDETAILVISIBLE by default:

**Table C-7 Default Descriptor Information (Visible in Item Details and Comparisons)**

<b>Descriptor</b>	<b>SEQUENCE</b>
Thumbnail Image *	1
Description *	2
Supplier	3
Supplier Site	4
Supplier Item	5
Supplier Part Auxiliary ID	6
Internal Item Number	7
Image *	7
Manufacturer	8
Manufacturer Item	9
Unit	10
Unit Price	11
Currency	12
Functional Currency Price	13

<b>Descriptor</b>	<b>SEQUENCE</b>
Functional Currency	14
Availability	15
Lead Time	16
UNSPSC Code	17
Item Type	18
Contract Number	20
Long Description	25
Attachment URL *	26
Supplier URL *	27
Manufacturer URL *	28

\* The order in which these are displayed in the item details and comparisons pages cannot be controlled by the sequence number.

The item category is always displayed in the search results and item details.

If any of the following descriptors are set to be not searchable, they still display on the **Advanced Search** page, but requesters will see an error message when selecting the descriptor, saying they cannot search on it:

- Description
- Supplier Item
- Supplier
- Category
- Manufacturer
- Manufacturer Item
- UNSPSC Code
- Supplier Part Auxiliary ID
- Internal Part Number

## XML Example 3: Creating Item Categories and Local Descriptors

In this example, two item categories, Envelopes and Pens, will be added to the catalog. In addition, local descriptors will be defined for both item categories.

```
<?xml version="1.0" ?> <!--version and character set encoding information-->
<CATALOG xml:lang="EN-US" > <!--language identification-->
  <ADMIN> <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>09-DEC-2002</DATE>
    </INFORMATION>
  </ADMIN> <!--end of administrative section-->

  <SCHEMA> <!--start of schema section-->
    <CATEGORY ACTION="SYNC"> <!--start of category section for first category-->
      <KEY>44.12.15.06.00</KEY>
      <NAME>Envelopes</NAME>
      <TYPE>GENUS</TYPE><!--type determines if category is browsing or item-->
    </CATEGORY><!--end of category section for category Envelopes-->

    <DESCRIPTOR ACTION="SYNC"><!--start of descriptor section for category
Envelopes-->
      <KEY>SIZE</KEY>
      <NAME>Size</NAME>
      <OWNER>
        <KEY>44.12.15.06.00</KEY>
        <NAME>Envelopes</NAME>
      </OWNER>
      <DESCRIPTION>Letter or Legal Size</DESCRIPTION> <!--description is optional,
for your own purposes-->
    </DESCRIPTOR> <!--end of descriptor section-->

    <CATEGORY ACTION="SYNC"> <!--start of category section for second category-->
      <KEY>44.12.17.04</KEY>
      <NAME>Pens</NAME>
      <TYPE>GENUS</TYPE> <!--type determines if category is browsing or item-->
    </CATEGORY> <!--end of category section for category Pens-->

    <DESCRIPTOR ACTION="SYNC"> <!--start of descriptor section for category
Pens-->
      <KEY>INK_COLOR</KEY>
      <NAME>Ink Color</NAME>
      <OWNER>
```

```

        <KEY>44.12.17.04</KEY>
        <NAME>Pens</NAME>
    </OWNER>
</DESCRIPTOR>  <!--end of descriptor section for descriptor Ink Color-->

    <DESCRIPTOR ACTION="SYNC">  <!--start of descriptor section for category
Pens-->
    <KEY>LENGTH</KEY>
    <NAME>Length (CM)</NAME>
    <OWNER>
        <KEY>44.12.17.04</KEY>
        <NAME>Pens</NAME>
    </OWNER>
    <TYPE>Number</TYPE>
    <DESCRIPTION>Length of the pen</DESCRIPTION>  <!--description is optional,
for your own purposes-->
    <SEARCHABLE>No</SEARCHABLE>
    </DESCRIPTOR>  <!--end of descriptor section for descriptor Length (CM)-->

</SCHEMA>  <!--end of schema section-->
</CATALOG>  <!--end of catalog-->

```

## XML Example 4: Deleting an Item Category and Local Descriptor

In this example, the item category Envelopes and the local descriptor Ink Color for the category Pens (created in XML Example 3) will be deleted.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>  <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
        <SOURCE>Acme</SOURCE>
        <DATE>09-DEC-2002</DATE>
    </INFORMATION>
</ADMIN>  <!--end of administrative section-->

    <SCHEMA>  <!--start of schema section-->
        <CATEGORY ACTION="DELETE">  <!--start of category section, deleting
Envelopes-->
            <KEY>44.12.15.06.00</KEY>
            <NAME>Envelopes</NAME>
            <TYPE>GENUS</TYPE>
        </CATEGORY>  <!--end of category section-->

```

```

    <DESCRIPTOR ACTION="DELETE"> <!--start of descriptor section, deleting Ink
Color-->
    <KEY>INK_COLOR</KEY>
    <OWNER>
    <KEY>44.12.17.04</KEY>
    </OWNER>
    </DESCRIPTOR> <!--end of descriptor section for descriptor Ink Color-->

</SCHEMA>
</CATALOG>

```

## XML Example 5: Creating a Base Descriptor

In this example, two base descriptors, Country of Origin and Shipping Cost, are added to the catalog.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>08-DEC-2002</DATE>
    </INFORMATION>
</ADMIN>

<SCHEMA>
<DESCRIPTOR ACTION="SYNC"> <!--start of first base descriptor-->
    <KEY>Country of Origin</KEY>
    <NAME>Country of Origin</NAME>
    <OWNER>
    <KEY>0</KEY> <!--key must be 0 when defining a base descriptor-->
    </OWNER>
    </DESCRIPTOR>

<DESCRIPTOR ACTION="SYNC"> <!--start of second base descriptor-->
    <KEY>Shipping Cost</KEY>
    <NAME>Shipping Cost</NAME>
    <OWNER>
    <KEY>0</KEY>
    </OWNER>
    <TYPE>Number</TYPE>
    </DESCRIPTOR>

</SCHEMA>

```

```
</CATALOG>
```

## XML Example 6: Updating a Base Descriptor

In this example, the name for the base descriptor Shipping Cost created in XML Example 5 will be updated.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2002</DATE>
    </INFORMATION>
  </ADMIN>

  <SCHEMA>
    <DESCRIPTOR ACTION="SYNC">
      <KEY>SHIPPING COST</KEY> <!--key is case insensitive-->
      <NAME>SHIPPING COST</NAME> <!--name changed to upper case-->
      <OWNER>
        <KEY>0</KEY>
      </OWNER>
    </DESCRIPTOR>

  </SCHEMA>
</CATALOG>
```

## XML Example 7: Deleting a Base Descriptor

In this example, the base descriptor Country of Origin created in XML Example 5 will be deleted.

---



---

**Note:** Use caution when deleting base descriptors, since deleting base descriptors may cause unrecoverable data loss. All items will lose the information provided by the base descriptors you delete.

---



---

```
<?xml version="1.0" ?>
  <CATALOG xml:lang="EN-US">
    <ADMIN>
      <NAME>General Office Supplies Catalog</NAME>
      <INFORMATION>
```

```

<SOURCE>Acme</SOURCE>
<DATE>08-DEC-2002</DATE>
</INFORMATION>
</ADMIN>

<SCHEMA>
<DESCRIPTOR ACTION="DELETE"> <!--start of deleting descriptor-->
<KEY>Shipping Cost</KEY>
<NAME>Shipping Cost</NAME>
<OWNER>
<KEY>0</KEY> <!--key must be 0 when specifying a base descriptor-->
</OWNER>
</DESCRIPTOR>

</SCHEMA>
</CATALOG>

```

## Hierarchy Section

The hierarchy section is optional. Use the hierarchy section for displaying a hierarchy of categories that requesters can browse online.

You can also use the Table of Contents online in Oracle iProcurement, in the eContent Manager, to perform the same actions as the hierarchy section. (If you bulk load browsing categories, but do not specify a hierarchy for them in the bulk load file, you will not see them on the initial **Build Table of Contents** page; however, you will find them when searching for categories in the Table of Contents Editor.)

If your XML file includes a category section but not a hierarchy section, the categories will exist by themselves. This means that requesters will not be able to browse the categories online, but will be able to find the items when performing a search.

The category hierarchy may contain multiple levels depending on the number of browsing categories assigned to the tree. At the lowest level of the tree will be the item categories. You do not have to have the same number of levels between categories. One category can contain subcategories, which contain item categories; another can contain only item categories. When creating the category hierarchy, keep in mind that categories that contain items can never become parent categories.

Maintain the category hierarchy using the action commands SYNC and DELETE.

The SYNC action adds or updates the hierarchy relationship specified in the file. (See the examples below.)

## Required and Validated Hierarchy Information

The following table describes the required hierarchy section fields:

**Table C–8 Hierarchy Fields**

Tag	Required?	Default Value	Description and Validation
<PARENT>	Yes	(No default)	Specifies the parent category. The parent is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. If you specify both, the HIERARCHY section requires the <KEY> tag to appear before the <NAME> tag.
<CHILD>	Yes	(No default)	Specifies the child category. The child is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. If you specify both, the HIERARCHY section requires the <KEY> tag to appear before the <NAME> tag.

## XML Example 8: Creating a Category Hierarchy

In this example, the browsing category Office Supplies is created, and the item categories Pens and Envelopes created in XML Example 3 are added as child categories to Office Supplies.

```
<?xml version="1.0" ?>  <!--version and character set encoding information-->
<CATALOG xml:lang="EN-US">  <!--language identification-->
  <ADMIN>  <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2002</DATE>
    </INFORMATION>
  </ADMIN>  <!--end of administrative section-->

  <SCHEMA>  <!--start of schema section-->
    <CATEGORY ACTION="SYNC">  <!--start of category section-->
      <KEY>OFFICE_SUPPLIES</KEY>
      <NAME>Office Supplies</NAME>
      <TYPE>NAVIGATION</TYPE>  <!--type specifies a browsing category-->
      <DESCRIPTION>Office Supplies</DESCRIPTION>  <!--description is optional, for
your own purposes-->
    </CATEGORY>  <!--end of category section-->
  </SCHEMA>  <!--end of schema section-->
```

```

<HIERARCHY>  <!--start of the hierarchy section-->
  <RELATIONSHIP ACTION="SYNC">
    <PARENT>
      <NAME>Office Supplies</NAME>
    </PARENT>
    <CHILD>
      <KEY>44.12.17.04</KEY>  <!--Pens is defined as the child of Office
Supplies-->
    </CHILD>
  </RELATIONSHIP>
  <RELATIONSHIP ACTION="SYNC">
    <PARENT>
      <NAME>Office Supplies</NAME>
    </PARENT>
    <CHILD>
      <KEY>44.12.15.06.00</KEY>  <!--Envelopes is defined as the child of Office
Supplies-->
    </CHILD>
  </RELATIONSHIP>  <!--end of relationship section-->
</HIERARCHY>  <!--end of hierarchy section-->

</CATALOG>  <!--end of catalog-->

```

## XML Example 9: Deleting a Parent-Child Relationship

In this example, the item category Pens (with the key 44.12.17.04) will be removed from its parent, Office Supplies. The category Pens and all of its contents will not be deleted from the catalog—people will still be able to search for the category and its items. The category Pens is no longer visible while browsing the categories, since it has been removed from the hierarchy.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2002</DATE>
    </INFORMATION>
  </ADMIN>

  <HIERARCHY>
    <RELATIONSHIP ACTION="DELETE">
      <PARENT>

```

```

    <NAME>Office Supplies</NAME>
  </PARENT>
  <CHILD>
    <KEY>44.12.17.04</KEY>
  </CHILD>
</RELATIONSHIP>
</HIERARCHY>
</CATALOG>

```

## XML Example 10: Changing a Parent-Child Relationship

In this example, the categories previously added to Office Supplies in XML Example 8 are moved to a new category, Desk Supplies.

---



---

**Note:** This example assumes that the browsing category Desk Supplies has already been created.

---



---

To move a category to another category, first delete it from its current parent category, using the DELETE action, then add it to its new parent category using SYNC:

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2002</DATE>
    </INFORMATION>
  </ADMIN>

  <HIERARCHY>  <!--start of the hierarchy section-->
    <RELATIONSHIP ACTION="DELETE">
      <PARENT>
        <NAME>Office Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.17.04</KEY>  <!--Pens category is removed from Office
Supplies-->
      </CHILD>
    </RELATIONSHIP>
    <RELATIONSHIP ACTION="DELETE">
      <PARENT>

```

```

    <NAME>Office Supplies</NAME>
  </PARENT>
  <CHILD>
    <KEY>44.12.15.06.00</KEY> <!--Envelopes category is removed from Office
Supplies-->
  </CHILD>
</RELATIONSHIP> <!--end of relationship section-->

<RELATIONSHIP ACTION="SYNC">
  <PARENT>
    <NAME>Desk Supplies</NAME>
  </PARENT>
  <CHILD>
    <KEY>44.12.17.04</KEY> <!--Pens is moved to Desk Supplies-->
  </CHILD>
</RELATIONSHIP>
<RELATIONSHIP ACTION="SYNC">
  <PARENT>
    <NAME>Desk Supplies</NAME>
  </PARENT>
  <CHILD>
    <KEY>44.12.15.06.00</KEY> <!--Envelopes is moved to Desk Supplies-->
  </CHILD>
</RELATIONSHIP> <!--end of relationship section-->

</HIERARCHY>
</CATALOG>

```

## XML Example 11: Deleting a Browsing Category

For this example, assume the following category hierarchy:

```

Office Supplies <--browsing category-->
  Storage <--browsing category-->
    Shelving <--item category-->
    Boxes <--item category-->

```

The following example deletes the browsing category Storage. Deleting the browsing category Storage also disconnects the item categories Shelving and Boxes from the hierarchy. The categories Shelving and Boxes themselves are not deleted, they are just no longer visible in the hierarchy when you delete their parent category, Storage.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">

```

```
<ADMIN>  <!--start of administrative section-->
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>09-DEC-2002</DATE>
  </INFORMATION>
</ADMIN>  <!--end of administrative section-->

<SCHEMA>
  <CATEGORY ACTION="DELETE">  <!--delete browsing category-->
    <KEY>OFFICE_STORAGE</KEY>
    <NAME>Storage</NAME>
    <TYPE>NAVIGATION</TYPE>
  </CATEGORY>

</SCHEMA>
</CATALOG>
```

## Reviewing and Saving Your XML File

See the tables in the previous sections to be sure that the information in your XML file will validate successfully. Make sure your XML file is formatted properly according to the DTD and examples in this document.

Save your XML file with a .xml extension.

## Loading Your XML File

Once you have created and reviewed your XML file, load it to Oracle iProcurement as follows:

1. Use the iProcurement Catalog Administration responsibility to access the eContent Manager home page.
2. In the navigation bar on the left, click the "Bulk Load Schema" link.
3. In the File Name field, enter either your file name and path, or click Browse to navigate to your XML file.
4. Click Start Load Now to send your file.

As soon as the load is started, the screen displays the Bulk Load Confirmation message and job number.

To check the status of your job, click View Load Status on the job confirmation page.

The **View Bulk Load Status** page tells you the status of your entire job:

- Pending (waiting to be processed)
- Running (processing the file)
- Completed
- Completed with Errors (loaded the file, but rejected some of the lines)
- Failed (found a format or encoding error)

Large files may take some time to load. You do not need to remain logged in while your job completes. If you need, click the Refresh or Reload button on your browser to update the status.

As an alternative to the **View Bulk Load Status** page, you can also view bulk load jobs in Oracle Applications:

1. In Oracle Applications, in the Oracle Purchasing or System Administration responsibilities, navigate to the View Requests window as follows:

From Oracle Purchasing: Requests

From System Administration: Requests > View

2. In the Find Requests window, choose to find all requests or enter a specific Request ID, Name, or other information.

The bulk load number assigned to your bulk load job in the eContent Manager is the same as the Request ID. The request name is Catalog Bulk Load - Catalog Structure.

3. You may be able to see more details about the bulk load and errors using the View Log button. (After you choose View Log, you may need to use the Next button to page through the entire log.)

If you still cannot determine the cause of an error using the log, temporarily set the profile option *POR: Set Debug Catalog Loader ON* to Yes with Detail and bulk load the file again. Setting this profile option to Yes or Yes with Detail displays a more detailed log of the bulk load process for that job. (This profile option should be set to Yes or Yes with Detail only while troubleshooting.)

---

---

**Note:** If you are not the same user who submitted the job, the View Log button is disabled.

---

---

## Resolving Errors

The **View Bulk Load Status** page alerts you to failures or validation errors in your XML file. Oracle iProcurement looks for errors in two phases: format errors and validation errors.

### Format errors (failures)

Format errors occur when the XML file fails validation against the DTD. Some examples of format errors include special characters in your file that are not covered by the character set specified in the `<?xml version="1.0" ?>` element, or a syntactic error such as forgetting to end the administrative section with `</ADMIN>`. If a format error is encountered, the load process stops, and a Failed status is returned.

If your job fails, fix the file and resubmit it for processing.

### Validation errors (rejected lines)

Once format errors, if any, are resolved, Oracle iProcurement checks for validation errors. Validation errors occur when information that you entered in your XML file does not match corresponding information already held within Oracle iProcurement or Oracle Applications. For example, if you do not define a required attribute in your XML file, the entire category, descriptor, or relationship in which the error occurred will be rejected.

If your job completes with errors, either select the job and click **View Rejected Lines** or click the link in the **Rejected Lines** column to view the errors. Fix the file and resubmit it for processing.

## Handling Special Characters

If you want to include special characters (such as `&`, or `<>`) in your XML file, use the CDATA tag as follows:

```
<CATEGORY ACTION="SYNC" >
  <KEY>Pens</KEY>
  <NAME><![CDATA[Felt & Ball Tip Pens]]></NAME>
  <TYPE>GENUS</TYPE>
</CATEGORY>
```

Alternatively, use HTML character sequences, such as `&amp;` for ampersand (`&`) or `&lt;` for less than (`<`):

```
<CATEGORY ACTION="SYNC" >
```

```

<KEY>Pens</KEY>
<NAME>Felt & Ball Tip Pens &lt; -- Special Values</NAME>
<TYPE>GENUS</TYPE>
</CATEGORY>

```

Use the CDATA tag only for special characters. For accents or other language-specific characters, you must use the proper encoding. See [Version and Character Set Encoding](#) on page C-4.

## Translating Catalog Schema

When you load a category or descriptor to the catalog, it is automatically loaded for all of the installed languages in the Oracle iProcurement database. Changes made to category relationships are also automatically reflected for all of the installed languages. To change the names or descriptions in another language, translate the XML file and load it again, specifying the supported language. When you delete a category or descriptor, it is deleted for all languages installed in the Oracle iProcurement database.

When you change a non-translatable attribute such as Searchable, or change the category hierarchy, the change is reflected for all of the languages installed in the Oracle iProcurement database. However, when you change a translatable attribute such as Description or Name, it is updated only in the language specified at the beginning of the XML file.

The information that can be translated for categories and attributes are the NAME and DESCRIPTION. The KEY must be included in the XML file for validation purposes, but cannot be translated. Furthermore, since the KEY for a category or descriptor is non-translatable and non-editable, its value will never change from when the category or descriptor was first created.

The following table shows the values in the database for a category whose name has been translated to Spanish. Notice that the key remains constant.

**Table C-9 Example Category Translation**

Tag	EN-US	ES-ES
<NAME>	Ball Point Pens	Boligrafos
<KEY>	UNSPSC_44121704	UNSPSC_44121704

---

---

**Note:** If you do not specify attributes such as SEARCHRESULTSVISIBLE in your translated file, they revert to their default values in all languages. For example, you change the SEARCHRESULTSVISIBLE attribute for a descriptor. Later, you bulk load a file specifying a different language description for the descriptor, but you omit the SEARCHRESULTSVISIBLE tag. The descriptor reverts to the default SEARCHRESULTSVISIBLE value.

---

---

## XML Example 12: Translating Categories and Descriptors

In this example, Office Supplies, Pens, and the two local descriptors for Pens are translated to Spanish. When users search the catalog in Spanish, they will see the names and descriptions of these categories and descriptors in Spanish.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="ES-ES" <!--language information indicates data is
Spanish-->
  <ADMIN>
    <NAME>Vision Operations</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2002</DATE>
    </INFORMATION>
  </ADMIN>

  <SCHEMA> <!--start of schema section-->
    <CATEGORY ACTION="SYNC">
      <KEY>OFFICE_SUPPLIES</KEY>
      <NAME>Material de oficina</NAME> <!--category name Office Supplies is
translated-->
      <TYPE>NAVIGATION</TYPE>
      <DESCRIPTION>Material de oficina</DESCRIPTION> <!--optional description is
translated-->
    </CATEGORY>
    <CATEGORY ACTION="SYNC">
      <KEY>44.12.17.04</KEY>
      <NAME>Boligrafos</NAME> <!--category name Pens is translated-->
      <TYPE>GENUS</TYPE>
    </CATEGORY>
    <DESCRIPTOR ACTION="SYNC">
      <KEY>INK_COLOR</KEY>
      <NAME>Color de tinta</NAME> <!--descriptor name Ink Color is translated-->
      <OWNER>
```

```

    <KEY>44.12.17.04</KEY>
  </OWNER>
</DESCRIPTOR>
  <DESCRIPTOR ACTION="SYNC">
    <KEY>LENGTH</KEY>
    <NAME>Tamano de la recarga</NAME> <!--descriptor name Length is
translated-->
    <OWNER>
      <KEY>44.12.17.04</KEY>
    </OWNER>
    <DESCRIPTION>Tamano de la recarga</DESCRIPTION> <!--optional description is
translated-->
    <SEARCHABLE>No</SEARCHABLE>
  </DESCRIPTOR>
</SCHEMA> <!--end of schema section-->
</CATALOG> <!--end of catalog-->

```

## Backwards Compatibility

The release of Oracle iProcurement Patchset I introduced two XML loaders—one for loading schema and the other for loading data. However, in previous releases of Oracle iProcurement, only one loader was used for both schema and data. To support catalog files that were created for earlier releases of Oracle iProcurement where the schema and data coexisted in a single file, both of the new loaders have been modified. These modifications eliminate any need to manually manipulate the catalog files.

When a catalog file is submitted through the "Bulk Load Items & Price Lists" link, the Schema and Hierarchy sections are ignored. When a catalog file is submitted through the "Bulk Load Schema" link, the Root\_Descriptors and Data sections are ignored.

To successfully load a catalog that was created in an older release of Oracle iProcurement, perform the following steps:

1. Navigate to the "Bulk Load Schema" link to load the catalog schema that is in the file.
2. Navigate to the "Bulk Load Items & Price Lists" link to load the catalog data that is in the file.

Please refer to [Appendix B](#) for further information regarding bulk loading catalog items, including the validations of the Root\_Descriptors and Data sections.



---

# Search Engine Logic

This appendix contains the following topics:

- [Search Methods](#) on page D-1
- [Items Displayed in Search Results](#) on page D-9
- [Related Links](#) on page D-11
- [Filtering and Sorting](#) on page D-11
- [Supported Search Methods by Catalog Type](#) on page D-13
- [Special Characters](#) on page D-13
- [Search Configuration](#) on page D-14
- [Relevance Ranking](#) on page D-17
- [Technical Details](#) on page D-18
- [Searching in Other Languages](#) on page D-22

## Search Methods

The basic search methods are as follows:

- Standard (or quick) search
- Expanded search
- Advanced search

For standard and advanced search, the search engine returns items that exactly match the keyword. For example, searching for *AB* does not return item number *AB22ZL*. Searching for *pen* does not return *pens*. You must use wildcards (such as *AB%*) to perform a partial match.

Searching is case insensitive. For example, entering *ab22zl* in the Search field finds *AB22ZL*.

You can also filter and sort search results, and view categories and shopping lists that match your search criteria.

## Standard Search

Standard search (quick search) is used when you simply type keywords in a store's Search field (in [Figure D-1](#) and [Figure D-2](#), the Search Office Supplies field) and click Go.

**Figure D-1 Standard Search from Shop Home Page**

The screenshot shows the Oracle iProcurement Shop Home Page. At the top, there is the Oracle iProcurement logo and navigation links: Return to Portal, Shopping Cart, and Help. Below the logo is a blue navigation bar with tabs for Stores, Categories, Shopping Lists, and Non-Catalog Request. The main content area is titled 'Shop' and features a 'My Favorite Store' section with a search field for 'Office Supplies' and a 'Go' button. A red arrow points to the 'Go' button with the text 'Enter a search term here to perform a standard search'. To the right, there is a 'Shopping Cart' summary showing 'You have saved carts.' and a 'Proceed to Checkout' button. Below the search field, there are 'Other Stores' sections for Computer Supplies, Wireless, Gifts and Promotional Items, Travel, Legal Services, and Industrial Supplies. At the bottom left, there is a 'TIP' section with links for 'Browse Categories', 'Browse My Favorites List and Other Shopping Lists', and 'Create a Non-Catalog Request'. At the bottom right, there is a 'Catalog Language' section showing the current language as 'American English' and a 'Change Catalog Language' link.

**Figure D-2 Standard Search from Shop Stores Page (When You Click a Store's Link)**

ORACLE  
iProcurement

Return to Portal Shopping Cart Help Diagnostics

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

Search Office Supplies  Go [Shop Other Stores](#)

Enter a search term here to perform a standard search

### Shop Office Supplies

These items consist of the lowest priced, most commonly selected supplies. All employees are encouraged to restrict their requests to these items whenever possible.

#### Available Catalogs

Enter keywords in the search field above and press the Go button to search the following available catalogs.

Name	Description
Standard Office Supplies	Pens, clipboards, whiteboards, clips, containers, and other non-paper supplies
All Paper Supplies	Folders, pads, sticky notes, and other paper supplies
<a href="#">Business Cards</a>	Order business cards here
<a href="#">Preview Oracle Exchange</a>	Transparent Punchout

#### Shopping Cart

You have saved carts.  
[Click here to view your saved carts.](#)  
[Proceed to Checkout](#)

#### Compare Items

No items selected.  
[Clear](#) [Compare](#)

#### Catalog Language

Your current catalog language:  
American English  
[Change Catalog Language](#)

Shop | Requisition Status | Receiving | My Profile | Return to Portal | Shopping Cart | Help | Diagnostics

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### Exact Match of All Words

In a standard search, each keyword must be found to determine a match. For example, entering *blue ballpoint pen* finds items containing blue and ballpoint and pen (in any order). No stemming is performed.

### Expanded Search

You may optionally expand a search by clicking "Look for any of the words, similar words, or spelling variations" at the bottom of the Search Results page, as shown in [Figure D-3](#).

Figure D-3 Expanded Search

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

Search Main Store  Go [Advanced Search](#) [Shop Other Stores](#)

Search results filtered by: **No active filter.** [Add Filter](#) [Remove All Filters](#)

[Hide Images](#) Sort by   Ascending  Descending [Go](#)

Standard Classification Folders, Legal, Blue

Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.

Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0008**  
 Manufacturer: **National Supplies** Manufacturer Item: Contract Number:

Price: **4.95 USD** Unit: **Each**

Quantity  [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

Hanging Partition Fastener Folders, Ruby Red

Durable 25-point pressboard covers in 4 bright colors. 6 separate filing sections for documents and printouts. Sturdy kraft dividers with strong metal fasteners. Tear-resistant Tyvek gussets allow for 2 1/4" expansion. Adjustable tab for easy identification.

Category: **File Folders** Supplier: **Acme Supplies** Supplier Item: **FDR-0007**  
 Manufacturer: **National Supplies** Manufacturer Item: Contract Number:

Price: **5.99 USD** Unit: **Each**

Quantity  [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

**TIP** Can't find it? Try the following options:  
[Look for any of the words, similar words, or spelling variations](#)  
[Create a Non-Catalog Request](#)

[Click here to perform an expanded search](#)

Shopping Cart  
You have saved carts. [Click here to view your saved carts.](#)  
[Proceed to Checkout](#)

Compare Items  
No items selected. [Clear](#) [Compare](#)

Catalog Language  
Your current catalog language: American English  
[Change Catalog Language](#)

Expanded search performs the following steps concurrently:

### Match of Any Words with Stemming

The search engine looks for records that match one or more of your keyword(s). The search engine also uses stemming to return any record containing at least one of the

search terms or stem derivatives.

### Begins With (Wild Card)

The search engine appends a wildcard to the end of each keyword(s). For example, the search engine converts *lead pen* to *lead% pen%* and returns *leaded pencils*.

### Fuzzy Match

The search engine looks for records that closely resemble your item, but are spelled differently. For example, for *telephone*, the search engine returns *telephone*.

---



---

**Note:** When you use wildcards (% or \*) in a keyword, stemming, begins with, and fuzzy logic are not applied.

---



---

## Advanced Search

As long as a store does not contains a transparent punchout catalog, an "Advanced Search" link displays next to the store's Search field, as shown in the following illustrations. (Transparent punchout catalogs do not support advanced searching. If the store contains a transparent punchout catalog, the "Advanced Search" link does not display.)

Figure D-4 Advanced Search Link on Shop Home Page

The screenshot displays the Oracle iProcurement interface. At the top, the Oracle logo and 'iProcurement' text are visible. Navigation links include 'Return to Portal', 'Shopping Cart', 'Help', and 'Diagnostics'. A blue navigation bar contains 'Stores', 'Categories', 'Shopping Lists', 'Non-Catalog Request', 'Shop', 'Requisition Status', 'Receiving', and 'My Profile'. Below the navigation bar, the 'Shop' section is active. Under 'My Favorite Store', there is a search field for 'Main Store' with a 'Go' button and an 'Advanced Search' link. To the right, a 'Shopping Cart' summary shows 'Number of Lines: 1' and a table of 'Recently Added Items' with columns for item name and quantity. The table lists 'Garfield 4 for sort b...' with a quantity of 1. A 'Proceed to Checkout' button is located below the table.

**Figure D-5** Advanced Search Link on Shop Store Page

The screenshot shows a web interface for a shop. At the top right, there are links for [Return to Portal](#), [Shopping Cart](#), [Help](#), and [Diagnostics](#). Below these is a navigation bar with tabs for [Shop](#), [Requisition Status](#), [Receiving](#), and [My Profile](#). The main navigation bar includes [Stores](#), [Categories](#), [Shopping Lists](#), and [Non-Catalog Request](#). A search bar labeled "Search Main Store" contains a text input field, a "Go" button, and a link for [Advanced Search](#). A link for [Shop Other Stores](#) is also present. The page is divided into three main sections: "Shop Main Store", "Available Catalogs", and a right-hand sidebar. The "Shop Main Store" section states "This store contains all approved common items." The "Available Catalogs" section includes a search instruction and a table with two columns: "Name" and "Description". The sidebar contains three panels: "Shopping Cart" (with a "Proceed to Checkout" button), "Compare Items" (with "Clear" and "Compare" buttons), and "No items selected."

**Stores** | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#)

Search Main Store   [Advanced Search](#) [Shop Other Stores](#)

### Shop Main Store

This store contains all approved common items.

#### Available Catalogs

Enter keywords in the search field above and press the Go button to search the following available catalogs.

Name	Description
All Local Content	All Local contents

#### Shopping Cart

You have saved carts.  
[Click here to view your saved carts.](#)

#### Compare Items

No items selected.

When you click the "Advanced Search" link, the Advanced Search page appears as shown in [Figure D-6](#).

Figure D-6 Advanced Search Page

**ORACLE**  
iProcurement

Return to Portal Shopping Cart Help Diagnostics

Shop Requisition Status Receiving My Profile

Stores Categories Shopping Lists Non-Catalog Request

### Advanced Search

Enter search values in at least one of the following fields and press the Go button to perform an advanced search.

✔ **TIP** The advanced search returns only items from: Main Store

[Click here to select another store.](#)

Description

Supplier Item

Supplier

Category

Add column

- Description
- Supplier Item
- Supplier
- Category
- Manufacturer
- Manufacturer Item
- Unit Price
- Unit
- Currency
- Internal Item Number

**Shopping Cart**

You have saved carts.  
[Click here to view your saved carts.](#)

**Compare Items**

No items selected.

Shop | [Requisition Status](#) | [Receiving](#) | [M](#) | [Shopping Cart](#) | [Help](#) | [Diagnostics](#)

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The first four fields on the **Advanced Search** page always display:

- Description (item description, not long description)
- Supplier Item
- Supplier
- Category

Advanced searching allows requesters to add the following fields:

- Description (item description, not long description)
- Supplier Item
- Supplier
- Category
- Manufacturer

- Manufacturer Item
- Unit Price
- Unit
- Currency
- Internal Part Number
- Supplier Part Auxiliary ID
- Lead Time
- UNSPSC Code

---



---

**Note:** You cannot customize the **Advanced Search** page using Oracle Application Framework or other customization tools.

---



---

If you enter advanced search criteria in more than one field, the system performs an *and* search. For example, if you enter *laserjet printer* for Description, *Acme* for Manufacturer, between *500* and *1,000* for Unit Price, and *USD* for Currency, the search engine looks only for laserjet printers made by Acme costing between 500 and 1,000 USD.

If you search on the same criteria in more than one field, the search engine also performs an *and* search between the two fields. In the following example, you use two Description fields, the provided Description and a Description field you add. The table shows the results, depending on the qualifier you select from the pull-down menu:

**Table D-1** *Advanced Search Examples*

First Description	Second Description	Result
<i>with all of the words</i> tape dispenser	<i>with the exact phrase</i> office supplies	Finds items containing tape and dispenser and office supplies
<i>with at least one of the words</i> tape dispenser	<i>with the exact phrase</i> office supplies	Finds items containing tape or dispenser and office supplies

Advanced search uses the following qualifiers:

- *with all of the words* performs an *and* search. For example, *blue point pen* finds items associated with blue and point and pen. (They don't have to occur together.)
- *with at least one of the words* performs an *or* search. For example, *blue point pen* finds items associated with blue or point or pen.
- *without the words* excludes the keywords. In the following example, the search engine finds all pens not manufactured by Acme (specifically, items with pen in the Description, without Acme as the Manufacturer):
  - Description: *with all of the words*: pen
  - Manufacturer: *without the words*: Acme
- *with the exact phrase* looks for the same keywords in that order. For example, a Description of *deluxe fountain pen* finds item descriptions containing deluxe fountain pen, together, in that order.
- *is between, is greater than, is, and is less than* are used by Unit Price. For example, *is between 500 and 1,000* looks for an item costing more than 500 and less than 1,000. (Select a Currency to avoid displaying prices in all currencies between 500 and 1,000.) The qualifier *is* performs an exact match. Entering 1.21 finds items that cost 1.21, not 1 or .21 or .2157. The system looks for the transaction (supplier's) price and currency.

Advanced searching does not use stemming.

## Items Displayed in Search Results

The following examples give an idea of how items in the local catalog display in the search results depending on how they were defined.

**Example 1** In the following example, two items display in the search results because the supplier item number differs between them:

Source	Supplier	Supplier Item	Item	Operating Unit	Price	UOM
Blanket Purchase Agreement 1234	Acme	3255156	15225	Vision Operations	1.75	EA
Blanket Purchase Agreement 1234	Acme	3255157	15225	Vision Operations	15.25	BOX

**Example 2** In the following example, two items display in the search results, each with its own price based on the supplier site given:

Source	Supplier	Supplier Item	Item	Operating Unit	Price	Supplier Site
Bulk load file	Acme	CS1234	(none)	Vision Operations	11.99	San Francisco
Bulk load file	Acme	CS1234	(none)	Vision Operations	9.99	New York

**Figure D-7 Example Item with Different Supplier Site-Based Prices**

The screenshot shows the Oracle iProcurement interface. At the top, there's a navigation bar with 'ORACLE iProcurement' and links for 'Return to Portal', 'Shopping Cart', and 'Help'. Below this is a search bar with 'Search Local Supplies' and a 'Go' button. The search results are for 'Standard Classification Folders, Legal, Yellow'. Two items are listed:

- Item 1:** Durable, with 2-inch metal fasteners. Category: Folders. Supplier: Acme Supplies. Supplier Site: New York. Price: 9.99 USD. Unit: EA.
- Item 2:** Durable, with 2-inch metal fasteners. Category: Folders. Supplier: Acme Supplies. Supplier Site: San Francisco. Price: 11.99 USD. Unit: EA.

Each item has a quantity input field set to 1 and buttons for 'Add to Cart', 'Add to Favorites', and 'Add to Compare'. On the right side, there are sidebars for 'Shopping Cart' (with a 'Proceed to Checkout' button), 'Compare Items' (with 'Clear' and 'Compare' buttons), and 'Related Links' (with 'Categories' and 'Shopping Lists' sections).

## Related Links

After performing a search, the search engine provides a Related Links box on the search results page. The Related Links box appears only on the **Search Results** page for local catalogs. The Related Links box contains matching categories and a link to see matching shopping lists.

The purpose of the Related Links is to let requesters browse categories and shopping lists that contain the items in their search results. These categories and shopping lists may contain items that did not match the requester's search, but that are related.

## Categories

Related categories contain items that match the search criteria. On the **Search Results** page, the requester can select a related category (and its subcategories if any) to see all matching items in that category.

## Shopping Lists

Related shopping lists contain items that match the search criteria. On the **Search Results** page, the requester can click the "Click here to see all related shopping lists" link, select a matching shopping list, and view all items contained on the shopping list. There are two types of shopping lists: My Favorites List (the requester's personal shopping list) and public lists. Public lists (also known as requisition templates) are created in Oracle Purchasing at the operating unit level and can be extracted to the catalog.

## Filtering and Sorting

After search results are returned, requesters can further refine the results using the filtering option. Filtering allows the requester to limit the results set for the selected filtering criteria. For example, if you only want to see items from the suppliers Acme and Acme Supplier, choose to filter by Acme and Acme Supplier. All suppliers other than Acme and Acme Supplier are eliminated from the search results.

Any descriptor that is set up as search results visible can be selected as filterable criteria, except for the following descriptors:

- Unit Price
- Functional Price

- Description
- Long Description
- Image
- Thumbnail Image
- Comments
- Attachment URL
- Supplier URL
- Manufacturer URL

Similar to filtering, requesters can sort the search results. For example, a requester searches for printer paper, and a large number of search results is returned. The requester can sort by supplier to quickly locate printer paper made by Acme Paper. Most options sort alphabetically. Options like Unit Price sort numerically. Words enclosed in quotation marks and numeric characters are listed first. (Alphabetic sorting does not apply to all languages, such as Chinese.) Sorting by relevance is an additional sorting option. See [Relevance Ranking](#) on page D-17.

Any descriptor that is set up as search results visible can be selected as a Sort By option, except for the following descriptors:

- Thumbnail Image
- Attachment URL
- Supplier URL
- Manufacturer URL
- Image
- Functional Price

See [Schema Editing](#) on page D-14 for more information on search results visible descriptors.

---

---

**Note:** Local descriptors (descriptors, such as Ink Color, that are defined only for a specific category, such as Pens) that are search results visible are sortable and filterable only if you find the items by browsing a category or by selecting a category in advanced searching.

---

---

## Supported Search Methods by Catalog Type

Local catalogs perform standard, expanded, and advanced searching as described in [Search Methods](#) on page D-1.

A transparent punchout sends the keywords the requester enters to the external catalog site and returns the matching results to the **Search Results** page.

Punchout and informational catalogs use keywords defined during their setup to find matching items. When setting up a punchout or informational catalog, you associate keywords with the catalog that, when entered as search criteria, display a link to the catalog on the **Search Results** page.

For more details on punchout and transparent punchout, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*. For more details on informational catalogs, see the online Help in the eContent Manager.

Unlike local catalog searching, transparent punchout searching does not support the following features:

- Filter search results
- Add to favorites list
- Perform expanded search
- Perform advanced search
- Browse categories

In transparent punchout search results, you can sort by Price only. In local search results, you can sort by relevance and by any descriptor that is set up as search results visible. (See [Search Configuration](#) on page D-14.)

## Special Characters

Standard and advanced searching allows some special (non-alphanumeric) characters, as described below.

### Class I: Non-Alphanumeric Characters Interpreted as Search Operators

The search engine supports the following search operators, both wildcards:

- %
- \*

You can use a wildcard (either the % or the \*) in the middle of or after your search characters. For example, a search on *o%* returns *Oracle* and *Open Markets Inc.* and a search on *op%* returns *Open Markets Inc.*

You can use a wildcard at the beginning of your search characters (for example, *\*shop*), but it slows search performance.

## Class II: Non-Alphanumeric Characters Interpreted as Searchable Characters

Non-alphanumeric characters in Class II are indexed in the database and can be searched. The following is a list of Class II non-alphanumeric characters:

- Hyphen (-)
- Underscore (\_)

For example, if the requester searches for *item-123 test*, the search engine looks for items that contain both *item-123* and *test*.

---

---

**Note:** Keywords with hyphens or underscores are treated as whole words. In the example above, a search on *item* does not find *item-123*. To search part of a word, use wildcards.

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## Class III: Non-Alphanumeric Characters Not in Class I or Class II

Class III non-alphanumeric characters are not indexed and are not searchable. If these characters appear in the search criteria, they are ignored and treated as white spaces. For example, if the requester searches for *red, white & blue*, the search engine ignores the comma (,) and ampersand (&), and looks for items that contain all the terms *red* and *white* and *blue*.

See [Technical Details](#) on page D-18 for further discussion.

## Search Configuration

Schema editing and profile options affect searching.

### Schema Editing

Searching is greatly influenced by schema editing. You can use schema editing to determine whether descriptors are searchable or whether they appear on the **Search Results Summary** and **Search Results** pages. A descriptor that is not searchable is

ignored by the search engine. A descriptor that is not search results visible is not displayed on the **Search Results Summary** and **Search Results** pages.

See [Default Base Descriptors](#) on page C-13 for a list of the default base descriptors and their default searchable and search results visible property settings.

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**Note:** Use careful judgment when deciding which descriptors to make searchable:

- The more descriptors you make searchable, the longer it takes to perform a search.
- If you make long values like Long Description searchable, the accuracy of the search is diluted. For example, a requester enters a search for *computer battery*. If Long Description is searchable, an item with the following Long Description would be included in the search results: *This adapter works with the X Series notebook computer and can be used with or without a battery.*
- If you set a descriptor as searchable, but do not make it either search results visible or item details visible, requesters may not understand why an item was included in their search results.

After the following descriptors, only the first 11 search results visible descriptors in the sequence display in the search results, for space considerations: Thumbnail Image, Description, Long Description, Unit, Unit Price, Currency, Functional Currency Price, and Functional Currency (and Category).

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### Online versus Bulk Load Schema Editing

For instructions on creating or updating descriptors online in the eContent Manager using the **Edit Schema** page, see the online Help in the eContent Manager. For instructions on using the bulk loader to create descriptors, see [Appendix C](#).

Using the online **Edit Schema** page, you can specify only the following properties:

- Setting the descriptor as String (which is the Text data type) or Numeric (which is the Number data type) when creating the descriptor.
- Setting the descriptor as search results visible (choosing Visible or Hidden) when creating or editing the descriptor.

Other descriptor properties can be set only through bulk loading. For example, only the bulk loader can change the searchable property and item details visible property.

### **Advanced Search**

The **Advanced Search** page's list of searchable descriptors is not affected by the schema editor. For example, if you set Manufacturer to be not searchable, it still displays as a searchable descriptor (field) on the **Advanced Search** page.

Although the **Advanced Search** page is not integrated with the schema editor in this way, setting the following descriptors to be not searchable will present an error message. If any of the following descriptors are set to be not searchable, they still display on the **Advanced Search** page, but requesters will see an error message when selecting the descriptor, saying they cannot search on it:

- Description
- Supplier Item
- Supplier
- Category
- Manufacturer
- Manufacturer Item
- UNSPSC Code
- Supplier Part Auxiliary ID
- Internal Part Number

### **Profile Options**

The following profile options are key influencers to search behavior. For descriptions, see [Profile Options](#) on page 2-8.

- POR: Approved Pricing Only
- POR: Catalog Result Set Size
- POR: Enable Advanced Search and Category Browse
- POR: Search Governor Value
- POR: Sort by Relevance
- POR: Show Thumbnail Images

- POR: Thumbnail Height
- POR: Thumbnail Width
- POR: Change Catalog Language
- POR: Transparent Punchout Timeout Limit (affects transparent punchout search results only)

For example, if POR: Approved Pricing Only is set to Yes, requesters see in their search results only items associated with contracts, such as blanket purchase agreements.

The following functionality enables you to further influence the search results:

- When bulk loading catalog items, you can specify an operating unit for an item. The item is then visible in the search results only to requesters in that operating unit.
- The profile option PO: Legal Requisition Type affects whether requesters see only external supplier items, only internal items, or both.

## Relevance Ranking

Relevance ranking is performed during standard, expanded, and advanced searching under either of two conditions:

- The POR: Sort by Relevance profile option is set to Yes (to always apply relevance ranking to the search results).
- The requester chooses Sort by Relevance for a specific set of search results (it doesn't matter how POR: Sort by Relevance is set).

The algorithm for the relevance calculation is complex, using scoring to rank the results. At a high level, relevance ranking does the following:

- First, how many search keywords does the item contain? An item that includes more search keywords is considered more relevant than an item that includes fewer search keywords. For example, the requester searches for *blue ballpoint pen*. Item 1 contains both *ballpoint* and *pen* in its searchable descriptors. Item 2 contains only *blue* in its searchable descriptors. Item 1 has a higher relevance score than Item 2.
- Second, how frequently do the search keywords appear in the searchable descriptors in the entire catalog? An item that contains less frequently found search keywords is considered more relevant than an item that contains more commonly found search keywords. For example, assume the search keyword

*blue* appears in 500 items, and the search keyword *pen* appears in only 100 items. Item 1 contains the search key word *pen* and Item 2 contains the search keyword *blue*. All else being equal, Item 1 has a higher relevance score than Item 2.

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**Note:** Relevance ranking has a bigger impact on expanded searching than standard searching. Since all keywords appear in standard search results, the results aren't well differentiated by relevance, especially the first relevance algorithm described above. You can still perform relevance ranking on the standard search results, but the ranking is not as obvious as it may be in expanded search results.

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## Technical Details

Oracle iProcurement leverages the powerful technology of Oracle interMedia to store, manage, search, and access text with relational data using standard SQL and powerful text-based retrieval.

The Oracle iProcurement search engine converts the search text entered by the requester into a query expression to be used in an interMedia CONTAINS query. Depending on the search, the appropriate CONTAINS query is used.

### Standard Search: match all search terms - *and* search

1. The search words are formed by splitting the search text with spaces. For example, when the requester searches for *ball point pen* the search words are *ball* and *point* and *pen*.
2. Any interMedia reserved characters in the search words are escaped. (See [Reserved Characters](#) on page D-20.)
3. The search words are joined with interMedia's AND (&) operator.

For example, when the requester searches for *ball point pen*, the query expression in the interMedia CONTAINS query for this search phase would be as follows:

```
{ball}&{point}&{pen}
```

The query finds all the items that contain the words *ball* and *point* and *pen*.

Relevance is calculated during this search only if POR: Sort by Relevance is set to Yes. See [Relevance Ranking](#) on page D-17.

## Expanded Search: stemming, begins with, and fuzzy search

1. The search words are formed by splitting the search text with spaces. For example, when the requester searches for *ball point pen*, the search words are *ball* and *point* and *pen*.
2. Any interMedia reserved characters in the search words are escaped. (See [Reserved Characters](#) on page D-20.)
3. All search words without search operators are applied with an interMedia STEM (\$) operator, suffixed with an interMedia wildcard (%) character, and applied with an interMedia FUZZY (?) operator.
4. The search words are joined with interMedia's ACCUM (.) operator.

For example, when the requester searches for *ball point pen*, the query expression in the interMedia CONTAINS query for this search phase would be as follows:

```
#{ball},#{point},#{pen},ball%,point%,pen%,?{ball},?{point},?{pen}
```

The query finds all items that contain any of the words *ball* or *point* or *pen*, including their interMedia stem derivatives, any word that starts with *ball* or *point* or *pen*, and any word in the fuzzy expansion of *ball* or *point* or *pen*.

Relevance is calculated during this search only if POR: Sort by Relevance is set to Yes. See [Relevance Ranking](#) on page D-17.

### Fuzzy Expansion

The interMedia fuzzy operator expands the search words to take care of things such as spelling mistakes, typing mistakes, and errors by scanning machines.

Each letter in a language is associated with a set of alterations. For example, lower case letter L (l) might be associated with digit one (1), since it looks similar to letter l. The letter l might be also associated with the similar-looking letter i, or it might be associated with the letter k, which is next to the letter l in a keyboard. Each of the alternate letters is assigned a weight. For example, for the letter l, the digit 1 may be given a weight of 50 and the letter i may be given a weight of 10; digit l appears more like letter l than the letter i.

All of the search words in the search text are expanded using alterations of the letters in the search words. For all of the letters in a search word, the alterations are used to arrive at several permutations of the search word. A weight is calculated for those permutations of the search word. All the permutations that have a weight more than a pre-defined threshold are considered in the fuzzy expansion for the search word.

For a detailed description of how fuzzy expansion works, please refer to the public patent at the following URL:  
<http://164.195.100.11/netacgi/nph-Parser?Sect1=PTO1&Sect2=HITOFF&d=PALL&p=1&u=/netahtml/srchnum.htm&r=1&f=G&l=50&s1='5742706'.WKU.&OS=PN/5742706&RS=PN/5742706>

## Advanced Search

Advanced search uses specific attribute fields to find items that match the keywords. Advanced searching does not use stemming.

Advanced search is implemented in interMedia by using sections for each of the searchable text attributes. For example, when the requester searches on the Description attribute, advanced search looks within the Description section in interMedia. Advanced search returns only items with a Description matching the keyword. For numeric attributes, advanced search does not use interMedia sections, but uses standard queries.

See [Advanced Search](#) on page D-5 for information on how advanced search operators, such as *with the exact phrase*, work.

## Reserved Characters

Reserved characters are non-alphanumeric characters that carry special meaning in interMedia. To properly classify them into the appropriate non-alphanumeric character classes (Class I, II or III, described earlier), they are escaped when entered as part of the search criteria. For example, a hyphen (-) is a searchable character; however, it also carries special meaning for interMedia. To interpret a hyphen as a searchable, rather than an interMedia, character, interMedia escapes the character.

The reserved characters are escaped by enclosing the search word within braces {}. If there is a % in the search word, either explicitly entered by the requester or introduced automatically by the search engine in a *begins with search*, {} cannot be used to escape reserved characters. In this case, each reserved character is escaped separately with a backslash \ character.

The following 19 reserved characters are escaped:

, & ? {} \ ( ) [ ] - ; ~ | \$ ! > \_ =

Here are a few examples to illustrate how Class II and Class III non-alphanumeric characters are handled in the iProcurement search:

**For Class II Non-Alphanumeric Characters:**

The requester searches for *item\_1% test*. In a standard search, the query expression in the interMedia CONTAINS query would be as follows:

```
item\_1%&{test}
```

In an expanded search, the query expression in the interMedia CONTAINS query would be as follows:

```
item\_1%,${test},item\_1%,test%,item\_1%,?{test}
```

The requester searches for *item-123 test*. In a standard search, the query expression in the interMedia CONTAINS query would be as follows:

```
{item-123}&{test}
```

In an expanded search, the query expression in the interMedia CONTAINS query would be as follows:

```
${item-123},${test},item\-123%,test%,?{item-123},?{test}
```

**For Class III Non-Alphanumeric Characters:**

The requester searches for *red+pen point*. In a standard search, the query expression in the interMedia CONTAINS query would be as follows:

```
{red+pen}&{point}
```

The interMedia parser treats + as a white space character because it is a non-alphanumeric character not defined as a printjoin. The matching items contain the phrase *red pen* and the word *point*.

The requester searches for *red&%*. In a standard search, the query expression in the interMedia CONTAINS query would be as follows:

```
red\&%
```

The interMedia parser treats the escaped & as a white space character because it is a non-alphanumeric character not defined as a printjoin. The search engine treats this search term as *red %* and usually results in an error message to refine the search criteria because of the presence of % as a separate word.

## Searching in Other Languages

Catalog content is partitioned by language:

- When you bulk load content, you specify a language in the bulk load file. The content is loaded to that language version of the catalog.
- When you extract content, master items and categories that were defined in other languages are extracted to the corresponding language versions of the catalog.
- Items returned from a transparent punchout should match the requester's search language, if the external site honors the search language.

If POR: Change Catalog Language is set to Yes, the requester can click a "Change Catalog Language" link on the **Shop** or search results pages to select a search language. The system then searches that language version of the catalog.

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**Note:** When extracting or bulk loading content, the system also rebuilds the search index. Each language has its own search index, and the index is rebuilt differently depending on the language. Therefore, you should not load content to the wrong language version of the catalog.

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## PO History Feed File

This appendix contains detailed information about the PO reconciliation history feed file.

### Format and Data Elements of PO History Feed

After the appropriate purchase orders have been extracted using the selection criteria, the data elements for the purchase orders are compiled in the correct format and included in the output PO History Feed file. The PO History Feed file structure contains 3 levels of information (called records):

- **Control Record:** Transaction information about the complete PO History Feed file as well as summary information about all purchase orders included in the feed.
- **Header Record:** For each purchase order included in the PO History Feed, header level information.
- **Detail Record:** For each purchase order included in the PO History Feed, line and distribution level information.

The data elements included in each of the records in the PO History Feed file are discussed in details below.

#### Control Record

The table below discusses the data elements which are sent as the Control record:

**Table E-1 Control Record Layout**

#	Field	Required	Length	Starting Position	Data Type	Action
1	Record Type Indicator	Yes	1	1	Alpha	C (for Control)
2	Creation Date Prefix	Yes	15	2	Alpha	Creation Date
3	File Creation Date	Yes	8	17	Numeric	YYYYMMDD - File Creation Date i.e. system date when the PO History Feed request was completed
4	Total File Amount Prefix	Yes	19	25	Alpha	Total File Amount
5	Sum of All PO Amounts	Yes	15 (12.2)	44	Numeric	Total Sum of all PO Amounts in File in Functional Currency of Operating Unit-format for Number is 12.2. Send first 15 characters only and truncate if necessary. Should include PO's with all statuses (i.e. ON, CN, OH) for calculation. Refer to Business Rules below for details.
6	Credit/Debit Indicator	Yes	1	59	Alpha	'D' for Debit, 'C' for Credit
7	Header Record Prefix	Yes	14	60	Alpha	Total Header
8	Total Header Records	Yes	5	74	Numeric	Total Number of Header Records in File. Should include PO's with all statuses (i.e. ON, CN, OH) for calculation. Refer to Business Rules below for details.
9	Detail Record Prefix	Yes	14	79	Alpha	Total Detail
10	Total Detail Records	Yes	5	93	Numeric	Total Number of Detail Records in File-Since canceled distributions on the PO are not included in the Detail Record, only non-canceled distributions should be counted during calculation. Refer to Business Rules below for details.
11	Start Date Prefix	Yes	12	98	Alpha	Start Date

#	Field	Required	Length	Starting Position	Data Type	Action
12	Transaction Start Date	Yes	8	110	Numeric	YYYYMMDD - Earliest last_update_date among all PO's in the file.  Should include PO's with all statuses (ON, CN, OH) for calculation. Refer to Business Rules below for details.
13	End Date Prefix	Yes	10	118	Alpha	End Date
14	Transaction End Date		8	128	Numeric	YYYYMMDD - Latest last_update_date among all PO's in the file.  Should include PO's with all statuses (ON, CN, OH) for calculation. Refer to Business Rules below for details.

The following rules apply to the data elements in the Control Record:

- All fields of data type Alpha are left-aligned and padded (if required) on the right with spaces. All field of data type Numeric are right-aligned and padded on the left (if required) with zeroes.
- Field #5, Sum of All PO Amounts sums up the PO Amount fields for all the Header Records in the functional currency of operating unit. Calculation for field includes purchase orders with all statuses (ON, CN, OH), which are included in the feed, not just the purchase orders with a status ON. Calculation does not include the estimated tax for the purchase order.
- Field #6 Credit/Debit Indicator: Debit means (+) or Credit means (-), depending on the value for Field #5 Sum Of All PO Amounts.
- Calculation for Field #8 Total Header Records includes purchase orders with all statuses (ON, CN, OH), which are included in the feed, not just the purchase orders with a status ON.
- For calculation of Field #10 Total Detail Records, since canceled distribution(s) on the purchase orders are not included in the Detail Record, only non-canceled distributions are accounted for.
- Field #12 Transaction Start Date: The date contains the earliest last\_update\_date among all the purchase orders in the feed. Calculation for field includes purchase orders with all statuses (ON, CN, OH) which are included in the feed, not just purchase orders with a status ON.

- Field #14 Transaction End Date: The date contains the latest last\_update\_date among all the purchase orders in the feed. Calculation for field includes purchase orders with all statuses (ON, CN, OH), which are included in the feed, not just the purchase orders with a status ON.

### Header Record

The table below discusses the data elements which are sent as the Header record

**Table E-2 PO History Feed Header Record.**

	Field	Required	Length	Starting Position	Data Type	Rules
1	Record Type Indicator	Yes	1	1	Alpha	H (for Header)
2	CM Ref #	Yes	2	2	Alpha	AX
	PO Number	Yes	15	4	Alpha	Only purchase orders with numbers up to 15 characters in length are sent. Purchase orders with numbers greater than 15 characters in length are not included and a warning is generated. Refer to business rules below for additional details.
3	Card Number	Yes	16	19	Alpha	Number of P-Card being charged. Numeric only, non-numeric characters from the P-Card number are removed before sending. Only purchase orders with P-Card numbers up to 16 characters in length are sent. Purchase orders with P-Card numbers greater than 16 characters are not included and a warning is generated. Refer to business rules below for additional details.
4	Cardmember Name	Yes	35	35	Alpha	In case of employee P-Cards: Card Member Name. In case of supplier P-Cards: Supplier Name. For both, only first 35 characters are included.

	<b>Field</b>	<b>Required</b>	<b>Length</b>	<b>Starting Position</b>	<b>Data Type</b>	<b>Rules</b>
5	Requestor Name	No	25	70	Alpha	In case of supplier p-cards: send blank. In case of employee P-Cards: Card Member Name. Only first 25 characters are included.
6	Requestor ID	No	10	95	Alpha	Employee Id for Requestor. Only first 10 characters are included.
7	Payment Type Indicator	Yes	1	105	Alpha	P for Employee P-Card. O for Supplier P-Card.
8	Supplier Name	Yes	100	106	Alpha	Field used to send both Supplier Name and Supplier Site Name. format of the field is Supplier Name-Supplier Site Name. Only first 100 characters are included.
9	Client Supplier Number 1	No	30	206	Alpha	Vendor ID (po_headers.vendor_id) Only first 30 characters are included.
10	Client Supplier Number 2	No	25	236	Alpha	Vendor Site ID (po_headers.vendor_site_id) Only first 25 characters are included.
11	Order Date	Yes	8	261	Numeric	last_update_date from PO Header in YYYYMMDD format.
12	Order Status	No	2	269	Alpha	Two-letter codes (ON, CN, OH). Refer to Table 6 for details.
13	Total Lines in PO	Yes	4	271	Numeric	Total number of details records included.  Since canceled distributions on the purchase order are not included as Detail Records, only non-canceled distributions are accounted for. Refer to Business Rules below for details.  If purchase order has a control status of Canceled or Finally Closed, no distributions are included as detail records. Refer to Business Rules below for details.

Field	Required	Length	Starting Position	Data Type	Rules
14 PO Amount	Yes	15 (12.2)	275	Numeric	Total Amount of purchase order in functional currency for operating unit. Even for purchase orders created in a currency different from functional currency for operating unit, the field is calculated in the functional currency (Refer to Business Rules below). Only first 15 characters are included.
15 Credit/Debit Indicator	Yes	1	290	Alpha	D for Debit, C for Credit.
16 PO Currency	Yes	3	291	Alpha	Always functional currency for operating Unit. Using three-letter ISO Acronym
17 Local Currency Amount	Yes	15 (12.2)	294	Numeric	Purchase order amount in PO Header Currency. Only first 15 characters are included.
18 Local Currency Code	Yes	3	309	Alpha	Currency in which purchase order is created (po_headers_all.currency.code). Using three-letter ISO Acronym.
19 Header Miscellaneous	No	40	312	Alpha	Field not used.

The following rules apply to the data elements in the Header Record:

- All fields of data type Alpha are left-aligned and padded (if required) on the right with spaces. All field of data type Numeric are right-aligned and padded on the left (if required) with zeroes.
- For Field #2 PO Number, only purchase orders with numbers of length equal to or smaller than 15 characters are included in the PO History Feed. If the purchase orders have numbers greater than 15-characters in length, then they are not included in the PO History Feed. In such case, the concurrent request completes with a Complete Phase with Warning Status and generates a warning message in the log file.
- For field #3 Card Number, only numeric card numbers of length equal to or smaller than 16 characters are extracted. The card number on the purchase order document is stripped of all special characters or alphabets, which are

used as separators (space, '-', etc.), so that only the numeric portion of the card number for the card is included. If after stripping the non-numeric portion of the card number, the length of the card number is greater than 16 digits, then the associated purchase order is not included in the PO History Feed. In such case, the concurrent request completes with a Complete Phase with Warning Status' and generates a warning message in the log file.

- The logic to determine the values for field #12 Order Status is as indicated in Table 3.
- When the purchase order has a control status of Canceled or Finally Closed, only the Header Record is sent with the Order Status field in the Header Record containing the value CN. No Detail Record is sent for that particular purchase order.
- Field # 13 Total Lines in PO contains the total number of Detail Records included for the purchase order. Only non-canceled Purchase Order Line Distributions in the purchase order are included as Detail Records for the purchase order.
- For purchase orders which are created in a currency different from the functional currency for the operating unit, field #14 PO Amount is still calculated in the functional currency using the applicable conversion rates.
- Field #14 'PO Amount' and field #17 Local Currency Amount do not include the estimated tax in the calculation.

#### Detail Record

The table below discusses the data elements which are sent as the Detail record

**Table E-3 PO History Feed Detail Record.**

	Field	Required	Length	Starting Position	Data Type	Rules
1	Record Type Indicator	Yes	1	1	Alpha	'D' (for Detail)
2	CM Ref #	Yes	2	2	Alpha	AX
	PO Number	Yes	15	4	Alpha	Only purchase orders with numbers up to 15 characters in length are sent. Purchase orders with numbers greater than 15 characters in length are not included and a warning is generated. Refer to business rules below Table 5 for details.

Field	Required	Length	Starting Position	Data Type	Rules
3 PO Line Number	Yes	4	19	Numeric	<p>Contains the PO Line Distribution Number.</p> <p>Since canceled distributions on the purchase order are not included as Detail Records, only non-canceled distributions are accounted for.</p> <p>If purchase order has a control status of Canceled or Finally Closed, no distributions are included as detail records, and this value will be 0.</p> <p>Refer to business rules below for details.</p>
4 Quantity	No	10 (7.2)	23	Numeric	<p>Quantity of Items ordered.</p> <p>Only first 10 characters are included.</p>
5 Unit of Measure	No	25	33	Alpha	<p>Unit of Measure for Ordered Items (po_lines.unit_meas_lookup_code).</p> <p>Only first 25 characters are included.</p>
6 Unit Price	No	10	58	Numeric	<p>Price per item ordered.</p> <p>Only first 10 characters are included.</p> <p>Refer to Business Rules below for details.</p>
7 Item Description	No	40	68	Alpha	<p>Description of Item Ordered (Mtl_system_items_kfv.description).</p> <p>Only first 40 characters are included.</p>
8 Accounting Code	Yes	180	108	Alpha	<p>Charge Account for distribution (po_distributions.code_combination_id).</p> <p>Individual accounting segments are separated by a semi-colon.</p> <p>Only first 180 characters are included. Semi-colons are included in the field length count.</p>
9 Client Inventory Number	No	40	288	Alpha	<p>Client Inventory Number (mtl_system_items_kfv.item_number).</p> <p>In case of no-catalog requests, field in blank.</p> <p>Only first 40 characters are included.</p>

Field	Required	Length	Starting Position	Data Type	Rules
10 UN/SPSC Code	No	16	328	Alpha	Field Not used
11 Receipt Indicator	No	1	344	Alpha	Field Not used
12 Line Detail Miscellaneous	No	40	345	Alpha	Field Not used
13 Credit/Debit Indicator	Yes	1	385	Alpha	'D' for Debit, 'C' for Credit. Refer to business rules below for details.
14 Vendor Part Number	No	50	386	Alpha	Field Not used

The following rules apply to the data elements in the detail record:

- All fields of data type Alpha are left-aligned and padded (if required) on the right with spaces. All field of data type 'Numeric' are right-aligned and padded on the left (if required) with zeroes.
- For field #3 PO Line Number, the field refers to the PO Line Distribution Number from the purchase order (and the not the PO Line Number as the name suggests). If the distribution(s) are in the status Canceled or Finally Closed, the distribution(s) are not included as detail record(s).
- For Field #6 Unit Price, the amount is calculated in the functional currency of operating unit. Calculation does not include the estimated tax.
- Field #13 Credit/Debit Indicator is either a Debit (D = +) or a Credit (C = -) depending on the value of Quantity multiplied by Unit Price.

### Sample PO History Feed file:

CCreation Date: 20020416Total File Amount: 00000000480.00DTotal Header:  
00002Total Detail: 00007Start Date: 20020416End Date: 20020416

HAX4426-15 478904789047890 Andrew Smith Andrew Smith  
0000005841PEPC TEST1 Supplier-SITE 1



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