# Oracle® iProcurement

User Guide

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**Oracle iProcurement User Guide, Release 12.2**

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# Preface

## Intended Audience

Welcome to Release 12.2 of the *Oracle iProcurement User Guide.*

See Related Information Sources on page xii for more Oracle E-Business Suite product information.

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## Structure

# Related Information Sources

## Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the Oracle E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

# Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

# Part 1

## iProcurement Catalog Administration Help

# 1

# Oracle iProcurement Content Management Help

## Getting Started with Catalog Authoring

**Getting Started with Catalog Management**



**Where do I start?**

1. Determine the types of catalog content you want your requesters to see.

2. Determine the correct content type or types to use in building your store front:: local, punchout, transparent punchout, or informational. See descriptions of content types, page 3-1.

3. Consider whether or how you will control access to your catalog content.

4. Create your content.
   - To create a local content zone, see managing the local content zone, page 1-2.
   - To create a punchout or transparent punchout content zone, see the Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout.
   - To create an informational content zone, sea the informational content zone instructions, page 3-10.

5. Decide whether you will create more than one store, page 3-2 in which to group your content zones.

6. Group your content zones into Stores. See Managing Content Zones and Stores.,

page 3-6

**How do I manage the local catalog?**

1. Analyze your catalog structure, page 5-1. What categories and subcategories do you use? What descriptors, such as manufacturer or ink color, do you use to describe items?

2. Create categories by using ; online schema maintenance, page 5-2 or the schema loader, page 5-3. (You can also include new categories and descriptors when uploading catalog items, if the POR: Auto Load Shopping Categories profile options is set to Yes. For more information, see the Readme file instructions that you download in steps below.)

3. If you created new categories in the previous step, use iProcurement category mapping, page 5-13 to map your categories to categories set up in Oracle Purchasing. (Alternatively, you can leverage mapping in Oracle e-Commerce Gateway while uploading items. See Applying Category Mapping, page 2-4.) All categories must map to Oracle Purchasing categories before requesters can successfully create requisitions. Optionally use Oracle Purchasing category mapping, page 5-16 to "rename" the categories as they are displayed in Oracle iProcurement.

4. Optionally use the category hierarchy, page 5-2 (or the schema loader, page 5-3) 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. There are several ways:

   - Use catalog upload for updating GBPAs, BPAs, and quotes.

   - The catalog upload supports Tab-delimited text, XML, CIF, or cXML content loading, page 2-5,

   - Use online catalog authoring, *Oracle iProcurement Catalog Help*.for updating GBPAs.

   - Use Oracle Purchasing forms to update requisition templates and Oracle Inventory to update master items.The following items from Oracle Purchasing are automatically included in the Oracle iProcurement catalog: master items, requisition templates, blanket purchase agreements, global blanket agreements, and quotations. See the *Oracle iProcurement Implementation Guide* for details on controls.

6. Define your local content zones. Optionally segment your zone by supplier or by category. Be sure your local content zones are assigned to one or more stores, page

3-3.

# 2

# Load Catalog Content

## Online Catalog Authoring

**Online Catalog Authoring**

Online catalog authoring complements the batch upload process, *Oracle iProcurement Catalog Help*. While batch upload is optimized for large data uploads, online authoring is designed for the catalog administrator to make small and quick updates to catalog content. These updates are made directly to the catalog using the Oracle iProcurement Catalog Administration Web interface.

## Flow

The online authoring process flows as follows:

- A global purchase agreement, enabled for authoring by the catalog administrator, is created by a buyer in Oracle Purchasing.
- In Oracle iProcurement Catalog Administration the catalog administrator selects the agreement to update.
- Catalog lines can be added from existing catalog items, uploaded, or manually entered.
- The updated agreement is submitted for approval.
- If acceptance is defined as required for catalog administrators, the buyer will receive a notification to review and accept the changes submitted by the catalog administrator. The changes accepted by the buyer are incorporated in the document and it is submitted for approval.
- Once approved, the agreement content is available for requesters in Oracle iProcurement.

## Viewing Agreements

1. From the Agreements tab of the iProcurement Catalog Administration home page you can view your agreements using a set of predefined search parameters or click Search to enter your own.

   If you click Search you can enter Agreement, Supplier, Buyer, or Approval Status information and click Go. You may also add additional search parameters and click Save Search to create your own personalized view.

   You can also create your own specialized views and set the default view by clicking Personalize.

2. From the search results you would select the agreement that you want to work on, select what you want to do with the agreement from the Select Agreement list, and click Go.

   - *Enable Supplier Authoring:* If you want the supplier to be able to update this agreement from Oracle iSupplier Portal select this action and click Go. (If the agreement has already been enabled for supplier authoring and no longer want them to do so, select *Disable Supplier Authoring* and click Go.)

   - *Update:* This selection opens the **Update Blanket Purchase Agreement** page which provides the tools to add additional lines to the agreement.

   - *View Difference Summary:* This selection opens the **Difference Summary** page which displays the differences between the changes you have entered and latest version of the agreement. The difference summary is available from the moment the administrator saves a change to the document until the buyer accepts or rejects the submitted changes. The lines of difference summary can be exported to a spreadsheet.

   - **View PDF:** If you wish to see or save a formatted version of the current agreement select this action and click Go. The pdf does not show the not yet approved changes made by the catalog administrator.

   - **Export**: Exports the content of the search results page as a list of agreements that you see on the page. The file shows all the columns from the page.

## Entering Agreements

1. Select the agreement you want to work on and choose the Update action. You will be able to manage or add to your selected agreement.

   > **Note:** You can only update line information for the agreement.

Clicking on the Header or Control tabs provides a view of that information for the agreement. Only an Oracle Purchasing buyer can make changes.

2. On the **Update Blanket Purchase Agreement** page you can mange existing agreement lines. You access the management tools using the icons found in the Actions column:

   - *Update (pencil):* This selection opens the **Update Line** page. Here you can update the item and category descriptors. For details of the standard information regarding the line see the *Oracle Purchasing User's Guide*.

     This page also provides access to the Item Attributes for this line. These are the descriptors used by the Oracle iProcurement search engine.

   - *Duplicate (pages):* This selection opens the **Update Blanket Purchase Agreement** page with the line you selected now duplicated. Make any changes needed and click Submit.

   - *Delete (trash can):* This selection provides a warning page indicating that you are about to delete the line.

3. On the **Update Blanket Purchase Agreement** page you can add new lines. You have several options for adding lines:

   - From the Add Lines list select *From Catalog* and click Go. The **Stores** page provides you with the opportunity to select any item in the catalog. Find your item, click Add to Document, and then click Complete when you are ready to return to your agreement with your new lines.

   - From the Add Lines list select *From Favorites* and click Go. The **Shopping List** page provides you with the opportunity to select a list. From the list find your item, click Add to Document, and then click Complete when you are ready to return to your agreement with your new lines.

   - From the Add Lines list select *Via Upload* and click Go. The **Upload Line** page is the same page described in Uploading Catalog Files, *Oracle iProcurement Catalog Help*..

   - Click the *Add 5 Rows* button and the **Update Blanket Purchase Agreement** page is refreshed with five empty lines that you can complete with your details. For details of the standard information for your line see the *Oracle Purchasing User's Guide*.

4. Click Save to save your changes and then Submit to initiate workflow approval. If appropriate in your organization, you can provide a justification before submitting

for approval by clicking Approval Options.

## Uploading Catalog Files

**Uploading Catalog Files**



**File Format Information**



**How do I download templates and instructions?**

Resource files, which are provided in a zip file, include a catalog file example or template and an HTML Readme file that describes how to create the file. The zip file may also contains files with a list of line types, job codes and categories used by the buyer. The contents of a resource file vary with the type of file you intend to use to upload.

1. On the **iProcurement** Catalog Admimistration home page, click the Upload subtab.

2. On the **View Document Upload History** page click Upload.

3. On the **Upload Document** page, click Download Resources to open the **Download Resources** page.

   **Note:** The resources downloaded from this page and from the global purchase agreement **Upload Lines** page are the same.

4. Decide whether you will upload your content using text, XML, CIF, or cXML files.

5. If you are loading a spreadsheet text file and all your items are in the same category, select the appropriate category name.
   - If you select a category name, you receive a spreadsheet template that includes category descriptor, page 5-2 fields for the category you selected.
   - If you are loading catalog items from different categories, leave the category blank.
6. Click Download and save the zip file to the location of your choice.

**How do I use a upload file to load my catalog items for blanket purchase agreements and quotations?**

Blanket purchase agreements and quotations can be used for uploading purposes but are not shown in detail in iProcurement Catalog Administration. You select the document number during the upload process. These documents are created and maintained in Oracle Purchasing.

Download the resource zip file as described above, and create the upload file:

When you download the instructions, you receive a DTD or template for creating the upload file and a Readme file that contains detailed instructions and examples. If you are creating an upload file to load catalog data for the first time, open and review the Readme file.

> **Note:** : If you have updated Oracle iProcurement, it is important to use the latest version of the DTD or templates. Each time a change is made to the catalog schema, the templates are automatically updated with the latest information. If you upload your catalog items using an older version of a template, the loader may find errors in your file.

**Load the upload file to the catalog:**

1. Once you have a completed catalog item file ready to upload, save it to the location of your choice.
2. Return to the **iProcurement** Catalog Administration home page. Click Agreement. On the **View Document Upload History** page click Upload.
3. On the **Upload Document** page:
   - Select the Document Type for your upload.
   - Enter or select the Document Number.
   - Select Tab-delimited Text for a text file, XML for an XML file, Catalog Interchange Format (CIF) for a CIF file, or cXML for a cXML file.

- Click Browse and locate your completed upload file.
- Select your file and click Open in the dialog box.

  **Tip:** If you cannot find your file in the Open dialog box, make sure you are browsing in the correct directory, and set the File Type in the dialog box to All files.

4. If you are uploading a CIF or cXML file, you must select a Classification Domain.
5. If you want to apply category mapping or some other code conversion to data in the file, select Yes for "Apply Oracle e-Commerce Gateway Mapping." See Applying Category Mapping, page 2-4 for details.
6. Optionally, select a limit for "Set Error Tolerance."
7. Click Submit. When the loader receives your file, validation begins. A confirmation page displays the job number that is automatically assigned to your job. Check the status of your job, page 2-13 to make sure that no errors occurred during the upload.

**How do I use a upload file to load my catalog items for global blanket purchase agreements?**

Global purchase agreements are those agreements that are visible on the **Agreements** page. They are created and enabled for catalog authoring in Oracle Purchasing.

Download the resource zip file from the **Upload Lines** page which is described below for uploads and create the upload file. See the download resources topic, above if you need more information.

When you download the instructions, you receive a DTD or template for creating the upload file and a Readme file that contains detailed instructions and examples. If you are creating an upload file to load catalog data for the first time, open and review the Readme file.

> **Note:** : If you have updated Oracle iProcurement, it is important to use the latest version of the DTD or templates. Each time a change is made to the catalog schema, the templates are automatically updated with the latest information. If you upload your catalog items using an older version of a template, the loader may find errors in your file.

**Load the upload file to the catalog:**

1. Once you have a completed catalog item file ready to upload, save it to the location of your choice.

2. Return to the **iProcurement Catalog Administration** home page. Click Agreement. If needed, run a search for the global agreement you wish to upload items to.

3. Select your global agreement and open it for update.

4. Select Via Upload from the Add Lines list and click Go. On the **Upload Lines** page:

   - Select Tab-delimited Text for a text file, XML for an XML file, Catalog Interchange Format (CIF) for a CIF file, or cXML for a cXML file.

   - Click Browse and locate your completed upload file.

   - Select your file and click Open in the dialog box.

     > **Tip:** If you cannot find your file in the Open dialog box, make sure you are browsing in the correct directory, and set the File Type in the dialog box to All files.

5. If you are uploading a CIF or cXML file, you must select a Classification Domain.

6. Select an option for Submit for Approval.

7. If you want to apply category mapping or some other code conversion to data in the file, select Yes for "Apply Oracle e-Commerce Gateway Mapping." See Applying Category Mapping, page 2-4 for details.

8. Optionally, select a limit for "Set Error Tolerance."

9. Click Submit. When the loader receives your file, validation begins. A confirmation page displays the job number that is automatically assigned to your job.

10. Check the status of your agreement to make sure that no errors occurred during the upload.

    - Find your agreement and click it's Agreement link. The uploaded lines should be visible when you click Lines.

    - If your new Lines are not visible; click the Header tab, select the View Upload Errors action, and click Go.

    - Note the Errors, correct the upload file, click Discard Errors, and begin the upload process again. See: Common Upload Errors, page 2-13.

**How do fields in upload files map to fields in Oracle iProcurement?**

For field mapping details, see the Readme files when downloading instructions and templates,  or the *Oracle iProcurement Implementation Guide*.

**How does translation work in upload files?**

For translation details, see the Readme files when downloading instructions and templates, or the *Oracle iProcurement Implementation Guide*.

**What is XML?**

An eXtensible Markup Language (XML) .xml file is a general-purpose markup language file used as a way of describing data which can also contain the data. XML is a subset of Standard Generalized Markup Language (SGML). The primary purpose of XML is to facilitate the sharing of data across different systems. The loader can process XML files to load catalog items and to load catalog schema information provided that the XML files conform to the current OAG XML DTD.

**What is CIF or cXML?**

A Catalog Interchange Format (CIF) file is a comma-separated text file. A commerce eXtensible Markup Language (cXML) .xml file is based on the XML language. The loader can process CIF or cXML files to load catalog items.

Typically, the supplier gives you a CIF or cXML file that it has prepared. (You can also download suppliers' CIF or cXML files from Exchange.Oracle.com.) The following sections describe how fields in a CIF or cXML file map to fields in Oracle iProcurement and explain how to load the files.

The loader has been qualified with CIF versions 2.1 and 3.0 and with cXML versions no earlier than 1.2.007.

**How do I open or edit a CIF or cXML file?**

Generally, you should not need to open or edit a CIF or cXML file. If there are problems with the file, however, you can open or edit it.

Open and save a cXML file in any simple text editor; save the file with a .xml extension. Open and save a CIF file in a simple text editor or spreadsheet application; save the file with a .cif extension. (When you view a CIF file in a simple text editor, you may see extra commas or quotations between the CIF fields. You do not need to remove the extra commas or quotations.)

To open a CIF file in a spreadsheet application for easier viewing:

1. Start your spreadsheet software.

2. From within the spreadsheet application, open the CIF file.

   **Tip:** If you cannot find the file in the Open dialog box, make sure you are pointing to the correct directory, and set the File Type in the dialog box to All files.

3. If your spreadsheet application prompts you for a data type, delimiter, or separator, choose the correct options. For example, in Microsoft Excel, choose Delimited, then Comma (not Tab).

4. If you make changes, save the file as a .cif file. If you cannot save it directly as .cif, save it as .csv, and then manually change the file name extension to .cif.

> **Note:** If your CIF file has special characters and you open and edit the file, then you must save it using the proper encoding for the characters. See instructions on encoding and special characters in the spreadsheet Readme

**What should I know about CIF files?**

There are two kinds of CIF files: index and contract. Index files contain item definitions and their corresponding pricing. Contract files contain pricing only and are not supported by the Oracle iProcurement loader.

CIF files provide a full load option. A full load is a replacement of one catalog file with another. See the Readme file from the Resources file, *Oracle iProcurement Catalog Help* for complete details regarding CIF files.

**What should I know about cXML files?**

cXML is based on XML and provides formal XML schemas for standard business transactions.

See the Readme file from the Resources file, *Oracle iProcurement Catalog Help* for complete details regarding cXML files.

## Applying Category Mapping

**Applying Category Mapping**

If the Apply Oracle e-Commerce Gateway Mapping option during loading is set to Yes, Oracle iProcurement checks whether category mapping is set up in Oracle e-Commerce Gateway. If the category in the file matches a category that is mapped in Oracle e-Commerce Gateway and is in the catalog, the loader adds the item to the mapped category. This option applies to all item load files.

For instructions on setting up category mapping for use by Oracle iProcurement, see the Oracle iProcurement Implementation Guide.

Choose No if you do not want to use category mappings in Oracle e-Commerce Gateway. For example, you may have set up the category mapping strictly for use with punchout catalogs or some other purpose, and do not want those mappings to apply to categories in the local catalog. Choose Yes if you want to apply already-established category mapping to your local catalog.

## Flow

The mapping process flows as follows:

- Upload an item, specifying a category such as File Folders.

- In Oracle e-Commerce Gateway, File Folders is mapped to OFFICE.SUPPLIES.

- If you select Apply Category Mapping during loading, then the loader loads the item to OFFICE.SUPPLIES.

- If POR:Auto Load Shopping Category is set to Yes, then the loader creates the File Folders shopping category if it doesn't already exist - but only if the mapping was not successful.

If your Oracle e-Commerce Gateway mapping overlaps with your iProcurement Catalog Administration mapping, then the following occurs:

- If OFFICE.SUPPLIES is mapped to a different shopping category in your Oracle Purchasing category mapping, page 5-16- for example, to Office Items - then the requester sees that shopping category (Office Items).

- The requester completes the requisition. If the category the requester sees is mapped to a different category in youriProcurement shopping category mapping, page 5-13- for example, to DESK.SUPPLIES - then the item appears in DESK. SUPPLIES once the requisition passes to Oracle Purchasing. (Optionally, the requester can see the category DESK.SUPPLIES if the category is made visible in the search.)

> **Important:** The iProcurement category is called a shopping category. A Purchasing category is siply referred to as a category. Requesters can see both types of categories depending on what the administrator makes visible. See the *Oracle iProcurement Implementation and Administration Guide* for more details.

## Details

The following table shows the fields upon which the loader performs category mapping, depending on the file format:

| File Format | Category Field that is Mapped |
|---|---|
| Tab-delimited text | Shopping Category |
| XML | <SHOPPING CATEGORY> |
| Catalog Interchange Format (CIF) version 2.1 | SPSC Code |

| | |
|---|---|
| CIF version 3.0 | Classification Codes (or SPSC Code if Classification Codes is not provided) |
| cXML | Classification |

Oracle iProcurement performs the mapping on the category name specified in the file; however, if you also specified a category key, Oracle iProcurement maps the key if it can't find the name. The category mapping is case insensitive. (The supplier validation for supplier-specific mapping is case sensitive.)

Category mapping is not performed on schema files that you upload.

## Examples

In the following example:

- The Oracle Purchasing category OFFICE.SUPPLIES has been mapped in Oracle e-Commerce Gateway to the external category File Folders.
- You upload a file that specifies the external category File Folders for an item.
- You choose to apply category mapping during the upload.

| External Category | Oracle Purchasing Category |
|---|---|
| File Folders | OFFICE.SUPPLIES |

Assume the following scenarios with this example.

**Scenario 1: OFFICE.SUPPLIES already exists in the catalog.**

The loader maps the category File Folders to OFFICE.SUPPLIES in Oracle Purchasing. Although the file specified File Folders as the category, the item is added to the category OFFICE.SUPPLIES.

**Scenario 2: OFFICE.SUPPLIES already exists in the catalog and includes both general and supplier-specific mapping**

Oracle e-Commerce Gateway enables you to specify mapping for a specific supplier, or for no specific supplier. The loader always chooses supplier-specific mapping over non-supplier-specific mapping.

| Supplier | External Category | Oracle Purchasing Category |
|---|---|---|

| | | |
|---|---|---|
| Supplier A | File Folders | PAPER.SUPPLIES |
| (no supplier specified) | File Folders | OFFICE.SUPPLIES |

In this example, the category File Folders in the file is mapped to PAPER.SUPPLIES if the supplier in the file is Supplier A. If the supplier in the file is Supplier B, then File Folders is mapped to OFFICE.SUPPLIES.

**Scenario 3: OFFICE.SUPPLIES does not exist in the catalog**

The loader can only map categories available in the catalog. In this scenario, the mapping fails. (If a default Purchasing Category has been defined in Oracle Purchasing, the default Purchasing Category is used. Otherwise, an error message is displayed, and the item is not processed..)

**Scenario 4: OFFICE.SUPPLIES exists in the catalog and is manually mapped to Organizers**

In addition to the mapping in Oracle e-Commerce Gateway, you have also mapped OFFICE.SUPPLIES to an Oracle iProcurement shopping category called Organizers, using Oracle Purchasing category mapping, page 5-16.

| External Category | Internal Purchasing Category | Mapped Shopping Category | Mapped Purchasing Category |
|---|---|---|---|
| File Folders | OFFICE.SUPPLIES | Organizers | OFFICE.<br>ORGANIZERS |

The loader maps File Folders to OFFICE.SUPPLIES in Oracle Purchasing. Since OFFICE. SUPPLIES is also mapped to Organizers in the catalog, the loader maps and loads this item to the Organizers shopping category. Finally, Oracle iProcurement uses the mapped shopping category to determine the item's purchasing category. For example, if Organizers is mapped to OFFICE.ORGANIZERS, iProcurement will load the item with OFFICE.ORGANIZERS as its PO category. (The requester sees the item in the Organizers category, but once the requisition passes to Oracle Purchasing, the category is OFFICE.ORGANIZERS.)

## Monitoring Loader Jobs and Errors

**Monitoring Loader Jobs and Errors**

How do I check the status of my catalog uploads?, page 2-13

How do I correct errors in my catalog upload?, page 2-13

How can I get more information about the job or error?, page 2-14

What other jobs can I monitor?, page 2-14

**How do I check the status of my catalog uploads?**

1. For blanket agreements and quotations navigate to the **View Document Upload History** page to view the list of jobs.

2. Use the raised column headings to sort by job or load date, if needed.

3. Your jobs are assigned one of the following status readings. (For file uploads, large files may take some time to load. You do not need to remain logged in while a job completes.)

   - **Pending:** The job is waiting to be processed.

   - **Running:** The job is in progress. For example, for file uploads, iProcurement Catalog Administration is loading the data.

   - **Completed:** The job completed successfully. For file uploads, all of your catalog lines loaded successfully. If changes to a blanket purchase agreement price exceed the price tolerance, buyers must go to the Purchasing Exceed Price Tolerances in Oracle Purchasing to accept the lines that exceed the tolerance. In addition, for catalog administrators, new blanket purchase agreement or quotation lines always require acceptance in Purchasing Exceed Price Tolerances in Oracle Purchasing

   - **Failed or Error:** For global purchase agreements, successful lines are loaded into staging area and then can be used in downstream processing such as buyer approval. For blanket purchase agreements and quotation uploads, if the file has one or more errors, the entire file is rejected.

4. If the job failed, try submitting it again. For file uploads, correct your file, page 2-4 and upload it again.

**How do I correct errors in my catalog upload?**

1. On the **View Document Upload History** page, find the jobs with status Error.

2. For failed jobs, click the status link.

3. On the **View Upload Errors** page, a description of each error displays. Edit the incorrect fields in your file. Rejected lines indicate validation errors.

   - **Validation Errors** Validation errors occur when information in your file does not match corresponding information in Oracle iProcurement. For example, if you enter values for Unit, Category, or Currency that Oracle iProcurement does not recognize, a validation error occurs. The item lines on which validation errors occurred are rejected.

4. For failed jobs with no rejected lines, the file experiences a format error.

   - **Format Errors** Format errors occur if your XML file does not conform to the DTD provided sections. Examples of format errors include extra rows or columns in your spreadsheet, or forgetting to include a closing tag. If you include special characters in your file, make sure they are covered by the language encoding specified at the beginning of the file. The field error in the page header displays the file format error message.

   If you uploaded global blanket agreement items, you can check the job status by looking at the Upload Status column in the agreement summary (this column is hidden by default and you must personalize the page to see it). In case of and error, there is a link to see the errors. You must discard the errors before you can update the agreement.

   For more information on correcting upload errors, see the Readme file that is part of your Resources file, *Oracle iProcurement Catalog Help*.

5. Once you have corrected the errors, save and re-upload the file.

**How do I get more information about the job or error?**

If you have trouble diagnosing an error in a job, or if you want to monitor the job in Oracle Applications, use the Requests window in Oracle Applications or Oracle Purchasing. The number assigned to your job on the **View Document Upload History** page is the same as the Request ID in the Requests window. Use the View Log button in the Requests window to get more details on the errors, if needed.

> **Note:** You must be logged on as the same user who submitted the job to access the View Log button for the request.

Jobs are named as follows in the Requests window:

- *Catalog Bulk Load - Items Upload (Catalog Bulk Load - Items Upload)* for item loads.
- See also schema jobs, page 5-18.

> **Note:** The Requests window uses different status readings for its jobs. For example, a file with a status of Failed on the **View Document Upload History** page has a status of Completed - Warning in the Requests window.

**What other jobs can I monitor?**

Besides file uploads and item deletions, you can also monitor schema jobs, page 5-18.

# 3

# Manage Content

## Understanding Catalogs, Content Zones, and Stores

**Understanding Catalogs, Content Zones, and Stores**



**What's a catalog?**

Catalog is general term that refers to your online shopping content. However, you don't define or setup catalogs in iProcurement. Instead you define content zones. Catalog Administrators partition local catalog content into local content zones, define punchout or transparent punchout content zones, and then assign these content zones to stores. The combination of content zones that you assign to a Store determines what catalog content your users see.

Oracle iProcurement offers four content zones that you can set up. You can create more than one of each type of content zone.

| Type | Location of Content | Description |
|---|---|---|
| Local | Oracle Purchasing | Consists of items, categories, and descriptors defined in Oracle Purchasing and Oracle Inventory. |

| Type | Location of Content | Description |
|---|---|---|
| Punchout | Supplier's site or Oracle Exchange | Consists of items that the supplier maintains. The requester clicks a link to the external site from the Shop store or Search Results Summary page, and adds items from the external site to the shopping cart in Oracle iProcurement. |
| Transparent punchout | Supplier's site or Oracle Exchange | When the requester searches for items, the transparent punchout content zone accesses the external site in the background and returns the matching items to the Search Results Summary and Search Results pages. The requester then adds the items to the shopping cart. |
| Informational | Oracle iProcurement | Captures instructions, policies, and links for ordering items and services that may not be supported by the other catalog types. For example, an informational content zone can contain a link to an existing policy or instructions page in your company. Unlike the other catalog types, items purchased through the informational content zone cannot be added to the shopping cart. |

See Managing Content Zone and Stores, page 3-6 for instructions and recommendations on creating these content zones.

See also Getting Started with Catalog Management, page 1-1.

**How do I choose which content zone to use?**

Different items and commodities are better suited to one content zone over another; however, there is no one-size-fits-all solution to content management. For additional guidance on the content zone to choose for your items and services, see the *Oracle iProcurement Implementation and Administration Guide*.

**What's a store?**

A store enables you to group content zones and smart forms into a single, searchable store. The store should be easy for requesters to understand - for example, a store containing all computer supplies or all office supplies. You can create one or more stores. These stores appear on the **Shop** page.

Requesters select a store before searching. to browse its content. (You cannot search more than one store at a time.) Using their preferences, requesters can also select a favorite store to search by default.

When you click a category from the browse by menu navigation, it displays all the categories available and displays the search results with search items. The External Site menu consists of all Punchouts which are mapped to stores. This includes both external Punchouts and transparent Punchouts. When a punch out is clicked from the browse by menu navigation, it displays the supplier site. The Smartforms menu consists of all Smartforms which are mapped to stores. When a smart form is clicked from the browse by menu navigation, it displays a non catalog request page with relevant fields to the smart forms. The Information menu consists of all information templates which are mapped to stores. When a information template is clicked from the browse by menu navigation, it displays the supplier site.

When requesters search, Oracle iProcurement searches across all content zones in the store and displays the results.

In the following example, you create two stores, which contain the following content zones. An X indicates whether the catalog is included in the store.

| Content Zone Name | Content zone Type | Store: Computer Supplies | Store: Office Supplies |
|---|---|---|---|
| Computer Peripherals | Local | X | |
| Office Items | Local | | X |
| Oracle Exchange Ergonomic Items | Transparent punchout | | X |
| Desktop and Notebook Computers | Punchout | X | |
| Internal Procedures | Informational | X | X |

In the example above, when the requester clicks the Office Supplies store, Oracle iProcurement searches the Office Items local content zone, the transparent punchout content zone, and the informational content zone. It does not search the Computer Peripherals local content zone or the punchout content zone; these are searched only when the requester accesses the Computer Supplies store.

For an illustration of how stores look to requesters during searching, see the *Oracle iProcurement Implementation and Administration Guide*.

You can create different configurations of stores. For example:

- Create a store with just one local content zone.
- Create a store with any combination of content zones, including more than one punchout or transparent punchout content zone.
- Create a store with only one punchout content zone. Clicking the store takes requesters directly to the punchout site.

**How do content zones and stores work?**

When requesters search for items within a store, Oracle iProcurement combines the search results from every local content zone in that store and displays them together. Oracle iProcurement does not distinguish if an item originated from one local content zone or another within a store. The aggregate of all local content zones within a store determines that store's content.

When you have other content zone types, such as transparent punchout content zones, in a store, Oracle iProcurement uses the **Search Results Summary** page to display matching items from your local and transparent punchout content zones. The summary page displays the top three matching items for each transparent punchout content zone, and the top three matches from your aggregated local content. From the **Search Results Summary** page, the requester clicks View More Results to see the full list of matching items on a detailed **Search Results** page.

For punchout and informational content zones, the summary page displays a link to the content zone if the requester's search keywords match the keywords defined for the content zone.

If you have too many content zones in a store, the **Search Results Summary** page may be long and the requester must scroll down to observe the full lists of matching items in the store. The **Search Results Summary** page is not displayed, and Oracle iProcurement displays the **Search Results** page directly, when:

- A store has only local content zones. Search results from local content zones are always aggregated and displayed together. When a store has only local content zones, it appears to the requester as if the store only has one (albeit aggregated) content zone.

- A store with only one local transparent punchout content zone. Search results from the sole transparent punchout content zone is displayed using the **Search Results** page.

- A store with only one punchout content zone. Oracle iProcurement redirects the requester to the site automatically when you click the store.

For an illustration of how the stores and content zones look to requesters during searching, see the *Oracle iProcurement Implementation and Administration Guide*.

**Notes and Tips:**

- Every punchout, transparent punchout, or informational content zone must be assigned to a store to be searchable. (The local content zone is already in the Main Store by default, although you can assign it to any store.)

- A content zone can be in multiple stores.

- A store can contain more than one content zone of the same type, such as two punchout content zones, or three local content zones.

- A store can contain any combination of content zones and smart forms, such as two punchout content zones, and three local content zones, and four smart forms.
- The more transparent punchout content zones in a store, the slower the performance may be (depending on factors such as network and Internet traffic and the external site's performance).
- The default Main Store has no image associated with it. If you want to associate images with stores, see creating or editing a store, page 3-12.
- Category browsing occurs in the local content zone only.
- A store that contains a transparent punchout content zone does not allow Advanced Search. Advanced Search is performed on the local content zone only.

**Are any default content zones or stores provided?**

Oracle iProcurement offers the following content zone by default. (Type displays on the **Manage Content Zones** page.)

| Content Zone | Type | Included in a Store by Default? |
|---|---|---|
| All Local Content | Local | Yes, the Main Store |
| Contractor Request | Contractor | No |

Oracle iProcurement offers the following stores by default.

| Store | Includes a Content Zone by Default? |
|---|---|
| Main Store | Yes, All Local Content |
| Non-catalog Request (Sub-Tab) | No |

You do not have to create a content zone or store. If you create no additional content zones or stores, then when requesters enter a search term on the **Shop** page, Oracle iProcurement searches All Local Content, in the Main Store. Items you upload will appear in the Main Store.

If you create other content zones, then you must assign them to a store - either the provided Main Store or your own. If you create other Smart Forms, then assign them to the provided Non-Catalog Request (subtab) store, or to your own store.

**How do I control access to content zones and stores?**

Any content zone can be assigned to one or more operating units, or to one or more responsibilities. When a security assignment is made, the content zone becomes accessible only to the responsibilities or operating units assigned to the content zone.

A store is hidden from a requester's view if the requester does not have access to any of its content zones.

## Managing Content and Stores

**Managing Content and Stores**



### How do I create or edit a local content zone?

To create a content zone:

1. In iProcurement Catalog Administration, select the Content Zones subtab from the Stores tab.

2. On the **Manage Content Zones** page, select *Create Local Content Zone* from the drop down list and click Go.

   For detail regarding the different types of catalog content see Understanding Catalogs, Content Zones, and Stores, .

   > **Note:** The default local content zone, All Local Content, contains items from all suppliers and categories. You can modify or delete it to fit your needs.

3. On the **Create Local Content Zone** page, enter a Name and Description. The name and description are used for your information only, they do not appear in the Oracle iProcurement shopping pages.

4. *Suppliers:* Select the suppliers whose items you want to appear in this content zone:

   - Select *Include items from all suppliers* to do just that.
   - Select *Include items from specific suppliers* to display the Add Suppliers region, .
   - Select *Exclude items from specific suppliers* to display the Add Suppliers region, .
   - Select *Exclude items that are sourced from suppliers* to do just that.
   - Optionally select "Include items without suppliers." Items that exist only in the Master Items window in Oracle Inventory, including internally orderable items, often do not have external suppliers associated with them. This option enables you to associate items like these. If you do not select this option, these items are still available in the base local content zone.

   **To add suppliers:**

   - Search for the supplier in the Search and Select popup.

     **Note:** .When searching for a supplier, the system performs a begins with search. If you do not know the beginning of the name you are searching for, use a wildcard - for example, % network.

   - Select one or more suppliers and click Select.
   - Repeat these steps for each supplier you want to add.

5. *Categories:* Select the categories whose items you want to appear in this content zone:

   - Select *Include items from all categories* to do just that.
   - Select *Include items from specific categories* to display the Add Categories region, .
   - Select *Exclude items from specific categories* to display the Add Categories region, .
   - Optionally select "Include items without shopping categories

   **To add categories:**

   - Search for the categories in the Search and Select popup.
   - Select one or more categories and click Select.
   - Repeat these steps for each category you want to add.

6. *Assign Content Zone Security:* Select the security for this content zone:
   - Select *Accessible to all users* to do just that.
   - Select *Secure by operating units* to display the Add Operating Units region, .
   - Select *Secure by responsibilities* to display the Add Responsibilities region, .

   **To add operating units:**

   - Search for the operating unit in the Search and Select popup.
   - Select one or more operating unit and click Select.
   - Repeat these steps for each operating unit you want to add.

   **To add responsibilities:**

   - Search for the responsibility in the Search and Select popup.
   - Select one or more responsibility and click Select.
   - Repeat these steps for each responsibility you want to add.

7. Click Apply to return to the **Manage Content Zones** page.

**To make this content zone accessible from other stores:**

- Click Stores. See creating or editing a store, page 3-12.

> **Note:** When you create a local content zone, you are not "removing" those items from the base local content zone. They always exist in the base local catalog. They additionally exist in the local content zone you just created and in the store in which you place that content zone.

**To manage a local content zone:**

- See managing a content zone, .

## What do Type, Store Assignment , and Download Punchout mean?

The **Manage Content Zones** page provides the following information for each content zone:

- *Type:* Local for a local catalog, Exchange for a punchout or transparent punchout to Oracle Exchange, Punchout or Transparent Punchout to a supplier site, Contractor for the contractor request, or Iinformational catalog. Local is the default local content that Oracle iProcurement provides.

- *Store Assignment:* Store to which the content is assigned. Content Zones must be assigned to a store to be searchable.

- *Download Punchout:* For punchout content you can download the punchout definition.

## How do I manage (update, copy, delete) a content zone?

1. In iProcurement Catalog Adminstration, click the Content Zones subtab in Stores.

2. *Update*: On the **Manage Content Zones** page, click the Update icon next to the content zone you want to update.

   - Change the information in the content zone to suit your new needs. Refer to the topics for creating each content zone for details..

   - Click Apply.

3. *Copy:* On the **Manage Content Zones** page, click the Copy icon next to the content zone you want to copy.

   - Change the information in the content zone to suit your new needs. Refer to the topics for creating each content zone for details..

   - Click Apply.

4. *Delete:* On the **Manage Content Zones** page, click the Delete icon next to the content zone you want to delete.

   - Respond to the warning message by clicking Yes to delete the content zone.

   Deleting a content zone does not delete its contents, it deletes the content zone definition:

   - When you delete a local content zone, the items and prices in the content zone still exist, but they are no longer visible to the requester by the local content zone definition you created. (To delete items and prices from the local content zone, item maintenance must be performed.) For example, you delete your local content zone A, which contains items from Supplier A. This content zone was assigned to a store called Travel. When requesters now search the Travel store, content zone A is no longer listed as a content zone in that store. Requesters no longer find items that were in content zone A when searching that store. Items from Supplier A are now returned in the search results only when requesters search the local content zone provided by Oracle iProcurement, if the local content zone is assigned to a store.

- You cannot delete the Contractor Request content zone that Oracle iProcurement provides.
- When you delete a punchout or transparent punchout content zone, its items and prices still exist on the external site, but you have deleted the capability to access that content zone. Requesters cannot access the items, and you cannot access the content zone definition.

  **Note:** If you delete a punchout to Oracle Exchange from which you downloaded punchouts, the downloaded punchouts are also deleted.

- When you delete an informational content zone, you delete the capability to access the catalog. Requesters cannot access the information in it, and you cannot access its content zone definition.

## How do I create or edit an informational content zone?

To create an informational content zone:

1. In iProcurement Catalog Administration, select the Content Zones subtab from the Stores tab.
2. On the **Manage Content Zones** page, select *Create Informational Content Zone* from the drop down list and click Go.

   For detail regarding the different types of content zone content see Understanding Catalogs and Stores, .

3. On the **Create Informational Content Zone** page, enter the following:
   - *Name and Description:*. (If the requester clicks a store name before searching, Oracle iProcurement displays the content zone names and descriptions it is searching. The Name also displays on the **Search Results** pages.) Maximum character limit for Name and Description: 2,000 bytes, page 6-4 each.
   - *Image:* Image file name or image URL that you want to display next to this content zone on the **Search Results Summary** page. If you enter an image name (such as abc.gif) rather than a full URL (such as http://www.abc.cm/abc.gif), make sure that the image exists in the directory specified in POR: Hosted Images Directory. If you specify no image, the content zone displays its Name and Description only. (Behind the scenes, the content zone displays a blank image file if you specify no image. If desired, you can change this default blank image file to always display a standard "no content zone image" file or message. See the image management section of the *Oracle iProcurement Implementation Guide*). Maximum character limit: 2,000 bytes, page 6-4. **Note:**If "Hide

thumbnail images" is selected in a requester's preferences, then the requester will not see the content zone's image.

- *Keywords:* Keywords used for searching. For example, if you enter the keyword fruit, this content zone displays on the **Search Results Summary** page when the requester searches for fruit. Oracle iProcurement displays this content zone if the search matches any part of the keywords. For example, if you enter the keywords legal size paper, the **Search Results Summary** page displays this content zone if the requester's search includes the words legal or paper or size. Maximum character limit: 4,000 bytes, page 6-4

- *URL:*. To link the content zone name to a site, enter the site's URL here. If you do not enter a URL, requesters see just the name and description. The name and description may be all you need; however, if the informational content zone includes lengthy procedures or links, you may want to include a URL here or in the Description that links to a master page that contains the information. Maximum character limit: 2,000 bytes, page 6-4.

4. If you want to vary language-specific fields, such as the name and description, seeTranslating Data, page 6-1.

5. *Assign Content Zone Security:* Select the security for this content zone:

   - Select *Accessible to all users* to do just that.

   - Select *Secure by operating units* to display the Add Operating Units region, .

   - Select *Secure by responsibilities* to display the Add Responsibilities region, .

6. Click Apply to return to the **Manage Content Zones** page.

7. Any content zone you create must beadded to a store, page 3-12 to be searchable. Either add the content zone to the default Main Store that Oracle iProcurement provides or create your own store to which to add the content zone.

**To edit an informational content zone:**

- See managing a content zone, .

## How do I search a content zone?

To search a content zone:

- Click **Search** on the **Manage Content Zone** page.

- The search parameters are content zone name, type, stores, operating unit, and responsibility.

- Enter values for one or more parameters to search a content zone.
- Optionally, to add another **Search** parameter, select a parameter from the **Add Another** drop-down and click **Add**.
- Click **Go**.
- The results table displays the search result. To sort the result, click the sort icon in the column header.

## What is the contractor request content zone?

Oracle iProcurement provides the Contractor Request content zone for use by Oracle Services Procurement.

If your company has enabled Oracle Services Procurement, then requesters can click Contractor Request directly below the Shop tab and be taken to the contractor request entry page. (See the Oracle iProcurement Implementation Guide for details on enabling Oracle Services Procurement.)

If desired, you can make contractor requests additionally accessible in a store. For example, you can assign the Contractor Request content zone to a store that you created. When a requester clicks the store on the **Shop** page, all of the content zone in that store are displayed. The requester can then click the Contractor Request content zone and be taken to the contractor request entry page. (If you create a store that contains only the Contractor Request content zone, then clicking the store takes the requester directly to the contractor request entry page.)

The method of clicking Contractor Request directly below the Shop tab always remains. Including the Contractor Request content zone in a store is an additional option for you, to make contractor requests accessible in other places.

## How do I create or edit other content zones?

For instructions on creatingpunchout or transparent punchout content zone, page 3-1, see the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*.

## How do I create or edit a store?

**To create or edit a store:**

1. In the iProcurement Catalog Administration, select the Stores subtab from the Stores tab.
2. On the **Manage Stores** page, click Create Store.
   - On the **Create Store: Assign Content** page, enter or edit a Store Name Maximum character limit for Store Name: 2,000 bytes, page 6-4

- *Image:* Enter or edit the name or URL of an image that you want to display next to this store. The image displays to requesters on the Shop page. If you enter an image name (such as abc.gif) rather than a full URL (such as http://www.abc.cm/abc.gif), make sure the image exists in the directory specified in POR: Hosted Images Directory. If you specify no image, the store displays its name and description only. (Behind the scenes, the store displays a blank image file if you specify no image. If desired, you can change this default blank image file to always display a standard "no store image" file or message. See the image management section of the *Oracle iProcurement Implementation and Administration Guide*). Maximum character limit: 2,000 bytes.

  > **Note:** If "Hide thumbnail images" is selected in a requester's preferences, then the requester will not see the catalog's image.

- *Description:* Enter a short description. These appear next to the store when it displays to requesters on the **Shop** page. Maximum character limit for Short Description: 240 bytes, page 6-4.

- *Long Description:* The Long Description displays after the requester clicks the store on the **Shop** page. The **Shop Store** page displays the long description near the top of the page; it displays the list of content zones and their descriptions below. Maximum character limit: 2,000bytes, page 6-4.

- *Add Content Zone:* Click Add Content Zone to select the content zones (catalogs) that you want to include in the store. See notes and tips, page 3-4 about adding multiple local or transparent punchout content zones to a store. **Note:** Removing a content zone from a store does not delete the content zone. You can add the removed content zone to another store.

- *Add Smart Forms*: Click Add Smart Forms to select the smart forms to be assigned to this store.

3. Click Continue to see if additional configuration is required for your store.

4. On the **Create Store: Configuration** page you can provide the store sequence, indicate if local content is to be displayed first in the search results summary screen, and only on that screen, by checking "Show local content first." Force a search results match by checking "Always Show as Match."

5. Click Apply to save your store.

6. If you want to vary language-specific fields, such as the name and description, seeTranslating Data, page 6-1.

**To search stores:**

From the **Manage Stores** page, click the filter icon to search the data based on the store or on the description.

To clear the filtering, click the icon adjacent to the filter icon.

**To sequence stores:**

1. On the **Manage Stores** page, click Sequence Stores. It is recommended that you sequence the order in which multiple stores display on the **Shop** page; otherwise, the stores display in a system-generated order.

2. Enter sequence numbers. You can reuse sequence numbers or use decimals.

3. Click Apply.

4. The stores are sequenced horizontally, three per row. For example, stores sequenced 1 through 4 display as follows on the **Shop** page:

| | | |
|---|---|---|
| Store 1 | Store 2 | Store 3 |
| Store 4 | | |

**To test stores setup**:

From the **Manage Stores** page click Test Stores Setup. For the operating unit and responsibility combination you can see details of the stores and content zones configuration.

## How do I sequence stores?

You can sequence your stores so that they are presented in a specific order to iProcurement requesters. When a requester logs into Oracle iProcurement, stores are displayed from left to right, top to bottom, in order of sequence numbers. Stores that the requester does not have access to are omitted from the **Shop** home page. See : Sequence Stores, *Oracle iProcurement Catallog Help*.

## How do I delete a store, and what happens?

Deleting a store does not delete the content zones in the store; it deletes the store definition.

> **Note:** Any content zones that are not assigned to a store are not accessible to requesters. To enable requesters to search the content zones that were in your deleted store, assign the content zone to another store.

If the store you delete is a requester's Favorite Store (requesters can select this in their preferences), then the requester's new favorite store defaults to the store with the lowest sequence.

**To delete a store:**

1. In the iProcurement Catalog Administration, select the Stores subtab from the Stores tab.

2. On the **Manage Stores** page, click the Delete icon for the store.

3. Click Yes to confirm the deletion.

## Creating Smart Forms

**Creating Smart Forms**

What is a smart form?, page 3-15

Can I vary smart forms by store?, page 3-15

Can I combine smart forms and other content zones in the same store?, page 3-16

How do I search for, create, or edit a smart form?, page 3-16

How do I use smart forms across operating units?, page 3-20

Can I hide the standard non-catalog request?, page 3-20

**What is a smart form?**

When requesters cannot find an item in a catalog, they can create a non-catalog request. In the request, the requester selects a category and supplier (or suggests a new supplier), and enters basic item information, including a description, price, and other information.

To create a non-catalog request, the requester clicks Non-Catalog Request directly below the Shop tab. This functionality comes built in with Oracle iProcurement. In addition to this standard non-catalog request, you can create different smart forms and assign them to one or more stores.

**Can I vary smart forms by store?**

There are two kinds of stores in which you can place your smart form:

- Default non-catalog request store, provided by Oracle iProcurement. This store does not look like other stores; it does not display on the **Shop** home page for the requester to search in or select. Instead, when a requester clicks Non-Catalog Request directly below the Shop tab, the default non-catalog request store is being used behind the scenes to house that request.

- Your own non-catalog request store. You can create a non-catalog request store that displays on the **Shop** home page along with other stores. For example, you can create a store called Non-Catalog Services. When requesters click the store, they can choose one or more smart forms that you created.

Any smart form that you add to either of these store types appears in the Request Type drop-down menu, under its smart form name, when the requester accesses the non-catalog request. For example, you can create a Computer Supplies smart form and an Office Supplies smart form and assign them to the same store. Both smart forms display in the Request Type menu for that store. The fields in the request vary depending on which smart form the requester selects.

**Can I combine smart forms and other content zones in the same store?**

When defining stores you can add any combination of content zones plus any number of smart forms.

**How do I search for, create, or edit a smart form?**

The iProcurement Catalog Administrator can search for one or more smart forms using the Search button for Smart Forms. The Search parameters are: Smart Form Name, Operating Unit, Item Type, Stores. The Add Another dropdown enables you to select other search criteria. If required, you can save the search parameter input value using save search option.

To define the smart form:

1. In iProcurement Catalog Administration, select Stores.

2. Click the Smart Forms subtab.

3. On the **Manage Smart Forms** page, click Create Smart Form.

4. On the page for creating or editing the smart form, enter the following fields:

   - Smart Form Name. Especially if you are creating several smart forms, enter a name that is meaningful to requesters - for example, Facilities Requests or Computer Services. This name appears in the Request Type field when requesters enter the request. Maximum character limit: 240 bytes.

   - Organization. Select the operating unit for which the smart form is available. For example, if you want only requesters in your German operating unit to use this smart form, select Germany Operations. A smart form must be created for a specific operating unit.

   - Item Type. Select one item type for which this smart form will always be used:

     - **Goods. I can provide a Description, Item Price and Quantity** (that is, goods billed by quantity). For example, you purchase 10 books at 25 USD each.

     - **Goods or Services. I can provide a Description and Total Amount** (that is, goods or services billed by amount). For example, you purchase 5,000 USD of services.

- **Services. I can provide a Description/Statement of Work, Rate and Quantity** (that is, services billed by quantity). For example, you purchase 10 hours of service at 100 USD per hour.

  **Note:** Each item type is associated with a line type defined in Oracle Purchasing, using a profile option. For example, Goods or services billed by amount defaults the line type entered in the profile option POR: Amount Based Services Line Type. Line types can be set up in Oracle Purchasing to default the category or unit of measure. The requester can change these defaults, unless you make these fields non-editable.

5. Continue with the steps below for editing the smart form fields.

**To edit the smart form fields:**

1. On the page for creating or editing the smart form, select whether each field is User Editable. If you de-select User Editable for a field, then the requester cannot change it.

   **Note:** All fields in the Default Item Information section are required when the requester enters the smart form. Do not de-select User Editable for a required field, unless you enter a default value for it.

2. If you want to provide default values for any of the following fields in the smart form, enter them here. For example, if your smart form is designed for items that are typically ordered by the Box, then select Box as the Unit of Measure.

   - Item Description. Maximum: 240 bytes.

   - Category.

   - Commodity. If the selected category has been assigned to a commodity in Oracle Purchasing, then the commodity displays. For example, the category Screwdrivers can be assigned to a Hand Tools commodity. These commodities are set up using the Commodities setup page in Oracle Purchasing. They are optional.

     **Note:** If you change this commodity structure that is set up in

Oracle Purchasing, then revisit your smart forms to ensure that they do not also need to change.

- Restrict categories to above commodity. If the category has been assigned to a commodity in Oracle Purchasing, then you can select this option. If you select this option and the Category is User Editable, then the requester can change the category, but only to another category within the commodity. Restricting categories to a commodity helps requesters more easily choose an appropriate category for the request.
- Quantity.
- Unit of Measure. This field does not display if the Item Type is Goods or services billed by amount.
- Unit Price. This field displays if the Item Type is Goods billed by quantity.
- Amount. This field displays if the Item Type is Goods or services billed by amount.
- Rate per Unit. This field displays if the Item Type is Services billed by quantity.
- Currency.
- RFQ Required. By default, this field is hidden on the page that the requester uses to enter the non-catalog request. Requesters use the RFQ flag to indicate to the buyer that he should request for a quotation for the item.
- Negotiated. By default, this field is hidden on the page that the requester uses to enter the non-catalog request. Use the "Personalize Page" link at the top of the page if you want to display this field. Use the Negotiated field if you are or will be implementing Daily Business Intelligence (DBI) for Procurement. If you select Yes, then DBI for Procurement considers all items ordered through this template to have negotiated prices, for reporting purposes. By default, this field is set to No. For more information, see the *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.
- Restrict Suppliers.
  - No. The list of suppliers that requesters can choose from is limited only to those whose supplier sites are valid in the requester's operating unit.
  - Category ASL. The list of suppliers that requesters can choose from is additionally limited to those suppliers that exist in the approved supplier list (ASL) in Oracle Purchasing, for the selected category. (The ASL in

Oracle Purchasing calls the category a "commodity.")

- Contract Number. If you want to associate a contract purchase agreement or global contract agreement in Oracle Purchasing with all items ordered through this smart form, then select the contract here.

  > **Note:** If you select a contract, then the supplier and site default. The requester cannot change the supplier and site in this case, even if User Editable is selected. The contact name and phone, if any, also default from the contract; however, the requester can change these, if User Editable is selected.

  The system parses 3 new extrinsic elements (buyerContractLineNumber, buyerContractNumber and supplierContractNumber) to support contract numbers in CXML. The supplier is able to send these details in cXML during Punchout.(similar to the native XML format) so that this item gets linked to the contract in the requisition line created.

- Supplier Name.
- Site.
- Contact Name. Maximum character limit: 36 bytes..
- Phone. Maximum character limit: 25 bytes..
- Supplier Item. Maximum character limit: 30 bytes..
- Manufacturer. Maximum character limit: 30 bytes..
- Manufacturer Part Number. Maximum character limit: 30 bytes..

3. If you want to assign information smart forms, continue with the steps below. Otherwise, see the steps below for assigning the non-catalog request smart form to a store.

**To assign information smart forms:**

1. On the page for creating or editing the smart form, click Add Smart Form if you want to assign information smart forms. For example, if the smart form is for business cards, assign a business card information smart form. This information smart form will appear at the bottom of the non-catalog request page that the requester completes. In this example, the smart form will include information smart form fields for a name, address, and phone number for the business card. For information on setting up information smart forms, see the *Oracle iProcurement Implementation and Administration Guide*.

**Note:** Only information smart forms that you explicitly assign to the smart form are used. All other information smart forms are ignored.

2. Continue with the steps below for assigning the smart form to a store.

**To assign the smart form to a store:**

1. Click Create to save your smart form.

2. Assign the smart form to either thenon-catalog request store, page 3-15 provided by Oracle iProcurement or a new store that you create. See the instructions forcreating or editing a store, page 3-12.

3. When you assign the smart form to the non-catalog request store, the store will prompt you to select a default smart form for each organization (operating unit) in the store. For example, if you created more than one smart form for an operating unit, then you can select which smart form is selected by default when accessed by requesters in that operating unit.

**How do I use smart forms across operating units?**

When you create or update a store you can assign smart forms to multiple operating units. The requester sees the smart forms linked to the active operating unit.

The Create Smart Forms and Update Smart Forms pages have a region called Assign Smart Forms Security. The region enables you to have security control function on Smart Forms. The options in this region are:

- Accessible to all users: for authorizing the Smart Forms to all users.

- Security by responsibilities: for authorizing the Smart Forms to specific responsibilities. Click the radio button, the Add Responsibilities button is displayed.

- Security by operating units: for assigning the Smart Forms to one or more operating units. Click the radio button, the Add Operating Units button is displayed.

When a catalog administrator performs this setup step in the smart form, requesters can see the smart form in the respective operating units or respective responsibilities.

**Can I hide the standard non-catalog request?**

You cannot delete the default Non-Catalog Request store, which contains the standard non-catalog request, and appears in the Shop subtab. You can, however, use function security to hide access to the standard non-catalog request by hiding the Non-Catalog Request link directly below the Shop tab. For example, you might hide the standard non-catalog request if you want requesters to use only , and appears in the Shop subtabs that you created and assigned to other stores. See the *Oracle iProcurement Implementation and Administration Guide* for details on function security.

# 4

# Punchout and Transparent Punchout Catalogs

## Creating Punchout or Transparent Punchout Content Zones

**Creating Punchout or Transparent Punchout Content Zones**

For information on setting up Oracle iProcurement to link ("punchout") to external supplier catalogs or to access the supplier catalogs using transparent punchout, see the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*. For definitions of punchout and transparent punchout content zones, seeWhat's a content zone?, page 3-1

# 5

# Online Schema Maintenance

## Catalog Structure Overview

**Catalog Structure Overview**



**What is a catalog schema?**

A catalog's schema refers to the structure and organization of the catalog. Schema consists of categor ies and descriptors.

You can use online Schema maintenance in iProcurement Catalog Administration to manage schema online, page 5-2, or you can upload schema, page 5-3.

**What types of categories are there?**

A category classifies items. Categories are of two types:

- Item categories (also known as genus categories) contain only items. They are found at the lowest level of the category hierarchy. Item categories are required. Every item in the catalog must belong to an item category.

- Browsing categories (also known as navigation categories) contain one or more browsing or item categories. They cannot contain items. Browsing categories are optional. They enable requesters to browse a hierarchy, page 5-2 of categories for items.

**What are descriptors?**

A descriptor describes items or categories. Descriptors are of two types:

- Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. The following base descriptors are required when adding items to the catalog: Supplier Item Number, Description, Unit, and Price.

- Category descriptors (also known as local descriptors) apply only to items within a specific category. Category descriptors vary from one category to another. For example, a category called Ball Point Pens may contain the category descriptors Ink Color and Tip Width.

**What is a category hierarchy?**

The category hierarchy presents a hierarchical view of the catalog to requesters. Use the category hierarchy to view and create hierarchies of categories and to create browsing categories.

For example, several item categories may be grouped under browsing categories as follows:

```
Office Equipment, Accessories and Supplies < - browsing category
   Office Supplies < - browsing category
      Desk Furniture < - item category
         MZ451DESK < - item
         MZ882DESK < - item
   Calendars < - item category
Writing Instruments < - browsing category
   Ball Point Pens < - item category
      PA453BIC < - item
      PA221ROL < - item
```

You do not have to have the same number of levels in all categories. In the example above, Office Equipment, Accessories and Supplies contains multiple levels of categories. Writing Instruments contains just two levels (one browsing and one item category level).

Creating a category hierarchy, page 5-9 is optional. If you create one, requesters see the hierarchy when they browse categories. If you do not create one, then requesters cannot browse categories for items. (They can still find items by searching, just not by browsing.) Some companies find it useful to enable requesters to browse categories, others may not.

> **Note:** The changes you make to the category hierarchy are visible immediately in the catalog.

**How do I edit schema online?**

In iProcurement Catalog Administration, select the Schema tab. Use the subtabs to manage base descriptors, page 5-6, manage item categories, page 5-4 (and category descriptors), and manage the category hierarchy, page 5-9 (including creating browsing categories).

**How do I use XML to upload my catalog schema?**

Download the XML zip file as described in the download resources,  topic and create the XML File:

When you download the XML instructions, you receive a document type definition (DTD) for creating the XML file and a Readme file that contains detailed instructions and examples. If you are creating an XML file to load catalog schema (categories and descriptors) for the first time, open and review the Readme_XML_Schema file.

**Load the XML file to the catalog:**

1. Once you complete your XML catalog schema file, save it to the location of your choice. Save the file with any name, using a .xml extension.

2. Return to the **iProcurement** Catalog Admimistration home page. Click Schema and Upload.

3. On the **View Schema Upload History** page, click Upload.

4. Click Browse to locate your completed file.

5. Select your file and click Open in the dialog box.

   > **Tip:** If you cannot find your file in the Open dialog box, make sure you are browsing in the correct directory, and set the File Type in the dialog box to All files.

   Use the View Schema Upload History page to monitor the schema upload jobs, page 5-18 and possible errors.

6. Click Submit. When the loader receives your file, validation begins. A confirmation page displays the job number that is automatically assigned to your job. Check the status of your job, page 2-13 to make sure that no errors occurred during the upload.

**Should I edit schema or upload it?**

You have the same functionality editing schema online as you do uploading it. Uploading gives you the advantage of planning your categories and descriptors up front, and loading them in a single file. Online maintenance enables you to search for, view, and sort the data. (iProcurement category mapping, page 5-13 and Oracle Purchasing category mapping, page 5-16 are performed only online.)

**How many categories and descriptors does the catalog support?**

The catalog supports the following:

- A maximum of 150 category descriptors per category, no more than 50 per type: 50

Text descriptors, 50 Translatable Text descriptors, and 50 Numeric descriptors.

- A maximum of 300 total base descriptors, no more than 100 per Text, Translatable Text, or Numeric types.
- Any number of item and browsing categories. (The more top-level browsing categories you have, the longer the**Category Hierarchy** page may take to display. See managing the category hierarchy, page 5-9.)

## Managing Item Categories

**Managing Item Categories**



**How do I create or edit a new item category?**

To create or edit an item category:

1. In iProcurement Catalog Administration, select the Schema tab.
2. Click Item Categories.
3. On the **Item Categories** page, do either:
   - Click Create Category.
   - Search for the category you want to edit and click the Update icon. If you cannot find the category, seecategory searching, page 5-5.
4. Enter the following information:
   - *Category Key:* Internal category code. The key cannot be changed once created and is the same across all languages. It can be the same as the name and can contain spaces. It does not display to requesters. Maximum character limit: 250 bytes, page 6-4.
   - *Category Name:* Displays to requesters online when shopping for items. The name should be unique among all categories. Maximum character limit: 250 bytes, page 6-4.

- *Description:* Description of the category, for your own purposes. The description does not display to requesters. Maximum character limit: 2,000 bytes, page 6-4 .

5. Click Apply.

6. See editing and creating descriptors, page 5-6 if you want to add category descriptors.

   **Note:** New item categories that you create must be mapped to categories in Oracle Purchasing. Otherwise, requesters cannot order items in that category. See Mapping iProcurement Categories, page 5-13.

To create a browsing category, which contains other categories, manage the category hierarchy, page 5-9.

**How do I search for an item category?**

On the **Item Categories** page, use only the following operators to search for item categories:

- *is.* Enter the exact category name if you know it.

- *starts with.* Enter the beginning of the category name. Do not use a wildcard (%) at the beginning of the search term, such as %engines.

Press Go. (Do not press Return on your keyboard.)

Only item categories can be found on the **Item Categories** page. To find browsing categories,manage the category hierarchy, page 5-9.

**How do I view all item categories in the catalog?**

You cannot use the search capability on the **Item Categories** page to find and list all item categories. You can, however, use the category hierarchy to do so.

1. In iProcurement Catalog Administration, select the Schema tab.

2. Click Category Hierarchy.

3. On the**Category Hierarchy** page, select any browsing category.

**How do I delete an item category, and what happens?**

On the **Item Categories** page:

1. Search for the category. If you cannot find the category, see category searching, page 5-5.

2. Click the Delete icon.

   **Caution:** You cannot delete a category if it is "in use" by any items. So you have to mass expire the items first.

3. Click Yes to confirm the deletion.

To delete browsing categories, see managing the category hierarchy, page 5-9.

**Why can't I find a category?**

The **Item Categories** page contains only item categories. To find browsing categories, see managing the category hierarchy, page 5-9.

Only certain operators are allowed when searching for item categories, page 5-5.

## Managing Descriptors

**Managing Descriptors**

How do I view, edit, or create descriptors?, page 5-6

How do I delete a descriptor, and what happens?, page 5-8

Why does the system create a job for some changes?, page 5-18

**How do I view, edit, or create descriptors?**

**To create or edit base descriptors:**

1. In iProcurement Catalog Administration, select the Schema tab.

2. Click Base Descriptors.

3. On the **Base Descriptors** page click Create Descriptor to create or click the Update icon to edit an existing base descriptor.

4. Enter descriptor information, page 5-7.

5. Click Apply.

**To create or edit item category descriptors:**

1. In iProcurement Catalog Administration, select the Schema tab.

2. Click Item Categories.

3. On the **Item Categories** page, search for the category to edit or click Create Category to create a new item category. If you cannot find the category to edit, see category searching, page 5-5.

4. If you intend to edit an existing category, click its Update icon. If you intend to add descriptors to the category, click Manage Category Descriptors.

5. On the **Manage Category Descriptors** page, do either:

   - Click Create Descriptor.

   - Click the Update icon for an existing descriptor.

6. Enter descriptor information, page 5-7.

7. Click Apply.

   **Note:** If you change the Searchable attribute of an existing descriptor, the system launches a job to handle the change. See information on monitoring schema jobs, page 5-18.

**Entering descriptor information:**

- *Descriptor Name:* Displays to requesters. For category descriptors, the name must be unique within its category and must not be the same as a base descriptor name. For base descriptors, the name must be unique among all descriptors in the catalog. Maximum character limit: 250 bytes.

- *Descriptor Key:* Internal identifier for the descriptor. The key must be unique. The key can be the same as the name, and can contain spaces. It cannot be changed once it is created, and is the same across all languages. It does not display to requesters. Maximum character limit: 250 bytes.

- *Description:* Description, for your own purposes. It does not display to requesters. Maximum character limit: 2,000 bytes.

- *Type:* Data type for the descriptor. You cannot update the type once it is specified.

  - Text: numbers or text that display the same in all languages and cannot be translated.

  - Translatable Text: numbers or text that can vary by language, if you translate them.

  - Number: positive or negative number, with or without decimals.

- *Sequence:*. If the descriptor is displayed in the search results, the sequence number indicates the descriptor's display sequence on the**Search Results Summary**, **Search Results**, **Item Detail**, and **Compare Item** pages. Category descriptors are displayed to requesters only when accessed by browsing categories online.

Use Manage Base Descriptors to see existing descriptor sequences. (You can reuse an existing sequence number, if you need to. The descriptor will display next to the one with the same number.) If you do not specify a sequence, Oracle iProcurement displays the descriptors after the default base descriptors that Oracle iProcurement provides.

- *Searchable*. Indicator of whether this descriptor will be searched by the search engine. For example, the category Pens contains the descriptor Ink Color. Some pens specify blue for the Ink Color. If Ink Color is not searchable, then a search for blue will not return a match.

- *Search Results Visible*. Choose Yes if you want the descriptor to display in the search results. Category descriptors are displayed to requesters only when accessed by browsing categories online.

  - Category descriptors are displayed in Search Results Summary and Search Results when the requester browses by category or advance searches against a particular category.

  - Category descriptors are always shown on the item detail page.

  - Category descriptors are shown in the Item compare when all items being compared are of the same shopping category.

  If the descriptor does not display in the search or browsing results, it still displays in the item's details (if Item Detail Visible is Yes). **Note:**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.

- *Item Detail Visible*. Indicator of whether you want this descriptor to display when someone in Oracle iProcurement views the details of an item or compares items.

- *Accessible*. Indicates whether you wish to display base and user-defined descriptors to suppliers or not. The dropdown values are External and Internal, the default value is External (visible to users).

  You can mark descriptors to be internal or external. Only external descriptors are visible to suppliers. However, a buyer can see both external and internal descriptors. Suppliers cannot view or update the internal descriptors even though suppliers are provided with access to BPAs (Enable Supplier Authoring for BPAs). This is applicable even when suppliers download BPA lines (they cannot download internal descriptors).

**How do I delete a descriptor, and what happens?**

When you delete a descriptor, you also delete its value. For example, if you delete the descriptor Ink Color from the category Pens, all items in that category no longer display the ink color. If you delete a base descriptor, all items in the catalog no longer display that descriptor. 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.

To delete a descriptor:

1. Follow theinstructions above, page 5-6 for finding and editing a base or category descriptor.

2. On the page that displays the descriptors, click the Delete icon for the descriptor.

3. Click Yes to confirm the deletion.

4. A job is created for the deletion. See Monitoring Schema Jobs, page 5-18.

## Managing Browsing Categories and the Category Hierarchy

**Managing Browsing Categories and the Category Hierarchy**



**How do I create or modify a hierarchy of categories?**

Although you can have any number of categories in the system, the performance of the **Category Hierarchy** page may be slow if it contains too many top-level browsing categories. Alternatively, if you have many browsing categories, but they are categorized under a manageable number of top-level browsing categories, then you will have no issues with the **Category Hierarchy** page.

> **Note:** If you plan to create a category hierarchy, do so before your list of browsing categories grows too large.

1. In iProcurement Catalog Administration, select the Schema tab.

2. Click Category Hierarchy.

3. On the **Category Hierarchy** page, do any of the following:

   - Create a topmost browsing category that will contain other categories. Click Create Top-Level Category. (If needed, you can later move this category, page 5-12 to another level.)

   - Create a new browsing category and place it under an existing browsing category. Select the existing category and click Create Child.

   - Place an existing item or browsing category under an existing browsing category. Select the category and click Insert Existing Child.

   - To create an item category, do not use this page. Click Item Categories to create your item category. Return to the hierarchy, select the browsing category, and click Insert Existing Child to insert your new item category.

4. If you are creating a top-level or child category, enter the following information:

   - *Category Key:* Internal category code. The key cannot be changed once created and is the same across all languages. It can be the same as the name and can contain spaces. It does not display to requesters. Maximum character limit: 250 bytes, page 6-4.

   - *Category Name:* Displays to requesters online when browsing the category hierarchy. The name should be unique among all categories. Maximum character limit: 250 bytes, page 6-4.

   - Description of the category, for your own purposes. The description does not display to requesters. Maximum character limit: 2,000 bytes, page 6-4.

5. If you are inserting an existing child:

   - After you click Insert Existing Child, search for the item or browsing category. See searching for the category, page 5-10.

   - Select the category and click Apply.

**How do I create a browsing or item category?**

Use the category hierarchy to create browsing categories, page 5-9. Use Manage Item Categories to create item categories, page 5-4.

**How do I find categories within the hierarchy?**

The **Category Hierarchy** page displays all categories that you created. If you inserted child categories, then these display under their parent browsing categories when you click the expand or focus icon.

To find an existing category that you want to insert under a browsing category, select the browsing category and click Insert Existing Child. Use the following tips to find the category:

- When searching for the Category Name, do not use contains or ends with, unless you also select a Type or Status.
- Do not use a wildcard (%) at the beginning of your search term, such as %engines, unless you also select a Type or Status.
- Use the Type to find only browsing categories, only item categories, or leave it blank for all types.
- Use a Status of Unconnected to find all categories that are not currently part of the hierarchy. Use Connected to find categories that are connected.
- Click Go. (Do not press Return on your keyboard.)

**How do I create a parent category?**

Follow the instructions, page 5-9 above for accessing the category hierarchy:

- To create a topmost browsing category that will exist directly under the root category, click Create Top-Level Category. (If needed, you can later move this category, page 5-12 to another level.)
- To create a browsing (parent) category under an existing browsing category, select the existing category and click Create Child.

Any category created through the category hierarchy is a browsing category that can contain only other categories, not items.

**How do I create a child category?**

Follow the instructions, page 5-9 above for accessing the category hierarchy:

- To create a child browsing category, select the category and click Create Child.
- To create a child item category, do not use the category hierarchy. Click Schema then Item Categories to create your item category. Return to the hierarchy, select the browsing (parent) category, and click Insert Existing Child to insert your new item category.

**How do I remove categories from the hierarchy, and what happens?**

To remove categories from the hierarchy:

1. On the **Category Hierarchy** page, locate the browsing or item category that you want to remove.
2. You may need to click the expand icon to find the category, if it exists under a

parent category.

3. Click the Remove icon for the category.

Removing a category does not delete it. The category still exists, but it is no longer part of the hierarchy. If the category that you removed contains subcategories, then the subcategories are also removed from the hierarchy. (It is like removing a branch from a tree. The removed branch still contains its sub-branches.)

In the following example, removing Office Supplies disconnects it from Office Equipment, Accessories and Supplies:

```
Office Equipment, Accessories and Supplies < - browsing category
   Office Supplies < - browsing category
      Desk Furniture < - item category
Writing Instruments < - browsing category
   Ball Point Pens < - item category
```

When browsing categories online, requesters now see:

```
Office Equipment, Accessories and Supplies < - browsing category
Writing Instruments < - browsing category
   Ball Point Pens < - item category
```

The removed browsing category, Office Supplies, still contains Desk Furniture. The item category Desk Furniture still contains its items. Requesters can still search for specific items in Desk Furniture, but they cannot browse for them through the hierarchy.

A job is created for removing the category from the hierarchy.

**How do I delete a category altogether, and what happens?**

To delete a browsing category:

1. On th e**Category Hierarchy** page, locate the browsing category that you want to delete.

2. You may need to click the expand icon to find the category, if it exists under a parent category.

3. Click the Delete icon for the category.

Deleting a category removes it entirely from the catalog. Deleting a category does not delete that category's subcategories, if any.

A job is created for deleting from category hierarchy.

To delete an item category, page 5-5, use Manage Item Categories.

**How do I move categories around?**

When you move a browsing category, the category and all its subcategories, if any, are moved to the new location in the hierarchy.

1. On the **Category Hierarchy** page, select the desired category and click the Remove

icon. The category is removed from the hierarchy, but still exists in the system.

2. Select the new desired parent category and click Insert Existing Child.

3. Search for and select the removed category.

4. Click Apply.

**Can I assign a category to multiple parents?**

You can assign a category to multiple parents:

1. On the**Category Hierarchy** page, select the desired parent category for the category.

2. Click Insert Existing Child and search for the category that you want to assign to the parent.

   **Tip:** Select a Status of Connected to narrow your search.

3. Select the category and click Apply. The category now exists under both its existing and new parents.

**What is the root category?**

For technical reasons, the system places all browsing categories under a root category. You cannot delete, remove, or edit the root category. Any time you create a browsing category, it is automatically placed directly under the root category, until you categorize it elsewhere.

## Mapping Shopping Categories

**Mapping Shopping Categories**

How do I remove the current shopping mapping?, page 5-16

**Why should I use shopping category mapping?**

Use shopping category mapping to map Oracle iProcurement catalog categories to categories defined in Oracle Purchasing. This.ensures that the items you upload will not error out. Oracle Purchasing and shopping categories can both be derived by the mapping when maintaining catalog content.

For example, you create a shopping category called Printers. You later want to upload an item to the Printers category. Before requesters can successfully complete a requisition for this item, you must map the shopping category Printers to a category in Oracle Purchasing using shopping category mapping. (Alternatively, you can leverage mapping in Oracle e-Commerce Gateway while uploading items. See Applying Category Mapping., page 2-4)

**When should I map shopping categories?**

If your requesters need to use the browsing capability, then you should use shopping category mapping.

**Can I map multiple shopping categories to an Oracle Purchasing category?**

Yes, using shopping category mapping, you can map multiple Oracle iProcurement catalog categories to a single Oracle Purchasing category.

**Can I map an shopping category to multiple Oracle Purchasing categories?**

No, using shopping category mapping, you cannot map a single Oracle iProcurement catalog category to more than one Oracle Purchasing category.

**Can I map an shopping category that has subcategories to an Oracle Purchasing category?**

Only item categories are mapped. By mapping a browsing category, you are mapping all item categories that it and its subcategories contain.

**How do I map shopping categories?**

1. In iProcurement Catalog Administration, select the Schema tab.
2. Click Category Mapping.
3. On the**Category Mapping** page, click Shopping Category. and search for the Shopping category, page 5-15.
4. Select one or more Shopping categories and click Map.
5. Search for the Oracle Purchasing category to which you want to map.
6. Select the Oracle Purchasing category and click Apply.

**How do I map a shopping category to a job?**

1. Using a Purchasing responsibility, open the Job Category Association page from Setup > Purchasing.

2. Click Create.

3. In the Create Job and Category Association page, click Job, search for a specific Job and select it.

4. In the Create Job and Category association page, click Category, search for the Category you require and select the required Oracle Purchasing Category.

5. In the Create Job and Category association page, click Shopping Category, search for the Shopping category and select the appropriate Shopping Category.

6. After selecting the appropriate Job, Category, and Shopping Category, click Apply.

**How do I find an shopping category to map?**

- When searching for the Shopping category that you want to map, do not use contains or ends with, unless you also select a Category Status.

- Click Go. (Do not press Return on your keyboard.)

**How do I view the current shopping mapping?**

1. On the **Category Mapping** page, select Shopping Category, and search for the shopping category, page 5-15 for which you want to view the mapping.

2. Note that only item categories are mapped. If the shopping category is a browsing category, then search for any of the item categories that it contains.

   **Tip:** Alternatively, search for the browsing category. Use the hierarchy icon to view its item categories, and then search for the item categories.

3. Once the item category is listed, click the Oracle Purchasing category to which it is mapped.

4. The resulting page displays all of the shopping categories that are mapped to that Oracle Purchasing category.

**How do I view the current shopping mapping to a job?**

1. Using a Purchasing responsibility, open the Job Category Association page from Setup > Purchasing.

2. In the Associate Jobs with Categories page, select Shopping Category, and search for the shopping category that you want to view, and that is mapped to the Job you

require, and click Go.

3. The search results display the Job, Purchasing Category, and Shopping Category mapping for the selected shopping Category.

**How do I remove the current shopping mapping?**

1. On the **Category Mapping** page,search for the shopping category, page 5-15 for which you want to remove the mapping.

2. Note that only item categories are mapped. If the shopping category is a browsing category, then search for any of the item categories that it contains.

   > **Tip:** Alternatively, search for the browsing category. Use the hierarchy icon to view its item categories, and then search for the item categories.

3. Once the item category is listed, click its Remove Mapping icon.

   > **Note:** There is a concurrent request for removing shopping category from the hierarchy.

## Mapping Oracle Purchasing Categories

**Mapping Oracle Purchasing Categories**



**Why should I use Oracle Purchasing category mapping?**

Use Oracle Purchasing category mapping to map categories defined in Oracle Purchasing to categories created in Oracle iProcurement. Oracle Purchasing category mapping is optional, to achieve the following:

- Display different category names to requesters than are defined in Oracle Purchasing.
- Map multiple Oracle Purchasing categories to a single shopping category.

For example, the following categories are defined in Oracle Purchasing:

| Category Code | Category Description |
|---|---|
| 0215.MISC | Miscellaneous Office |
| 0217.MISC | Miscellaneous Furniture |

In Oracle iProcurement, these categories display by their category description to requesters. (If no description is provided - it is optional - then the categories display by their category code to requesters.) You may wish to display a single category name that is more meaningful to requesters than its code or description. In this example, you create a category called Office Supplies in Oracle iProcurement. Then you use Oracle Purchasing category mapping to map 0215.MISC and 0217.MISC to Office Supplies. When requesters order items, they see the category Office Supplies, but internally this category is mapped to 0215.MISC for all miscellaneous office items and 0217.MISC for all miscellaneous furniture items. Once viewed in Oracle Purchasing, the requisition and purchase order display 0215.MISC or 0217.MISC accordingly.

**When should I map Oracle Purchasing categories?**

If the profile *POR: Autocreate Shopping Category and Mapping* is set to Yes, then for any new Oracle Purchasing category, a shopping category and the corresponding mapping are automatically created. If the profile is No, then no shopping category and mapping are created. You can create them manually.

**Can I map multiple Oracle Purchasing categories to a shopping category?** Yes, you can map multiple Oracle Purchasing categories to a single shopping category.

**Can I map an Oracle Purchasing category to multiple shopping categories?**

No, using Oracle Purchasing category mapping, you cannot map an Oracle Purchasing category to multiple shopping categories.

**Can I map Oracle Purchasing categories to a shopping category that has subcategories?**

No, using Oracle Purchasing category mapping, you cannot map Oracle Purchasing categories to a category that contains subcategories; you can map only to the lowest-level (item) categories.

**How do I map categories using Oracle Purchasing category mapping?**

1. In iProcurement Catalog Administration, select the Schema tab.

2. Click Category Mapping.

3. Click the Purchasing Category subtab and search for the Oracle Purchasing category, page 5-18.

4. Select one or more Oracle Purchasing categories and click Map.

5. Search for the shopping (Oracle iProcurement) category to which you want to map.

6. Select the shopping category and click Apply.

**How do I find an Oracle Purchasing category to map?**

- When searching for the Purchasing category that you want to map, do not use contains or ends with, unless you also select a Category Status.

- Click Go. (Do not press Return on your keyboard.)

**How do I view the current mapping?**

1. On the **Category Mapping** page, search for the Oracle Purchasing category for which you want to view the mapping.

2. Once the category is listed, click the Oracle iProcurement category to which it is mapped.

3. The resulting page displays all of the Oracle Purchasing categories that are mapped to that Oracle iProcurement category.

**How do I remove the current category mapping?**

1. On the **Category Mapping** page, search for the Oracle Purchasing category for which you want to remove the mapping.

2. Select one or more Oracle Purchasing categories and click Remove Mapping.

## Monitoring Schema Jobs

**Monitoring Schema Jobs**



**Why does the system create a job for some changes?**

Some changes that you make in online schema maintenance are delegated to a job, which runs in the background while you complete other tasks.

The following online schema changes are delegated to jobs, which you can monitor on the **View Schema Upload History** page, by their job name:

| Job Name | Description |
|---|---|
| Updating category name to *your new category name* | Changing an item category name launches a job to re-index the items under the new category name. |
| Updating descriptor searchability: *your descriptor name* | Changing the searchable attribute of an existing descriptor launches a job to re-index the items for future searching. |
| Deleting descriptor: *your descriptor name* | Deleting a descriptor launches a job to re-index the items without the descriptor, for future searching. |
| Deleting category from category hierarchy: *your category name* | Deleting category launches a job to update the category list for the content zone(s). |
| Removing category from category hierarchy: *your category name* | Removing categories from the hierarchy launches a job to update the category list for the content zone |
| Inserting child category under parent category *your parent category name* | Inserting existing child into category hierarchy launches a job to re-index |

**How can I get more information on a job or error?**

You can monitor the job in the **View Schema Upload History** page by clicking the error link.

If you have trouble diagnosing an error in a job, or if you want to monitor the job in Oracle Applications, use the Requests window in Oracle Applications or Oracle Purchasing, page 2-14. (The job number is also its Request ID.)

Each schema job is named as follows in the Requests window:

| Job Name | Request Name |
|---|---|
| Inserting child category under parent category *your parent category name* | Update Zone For Category Hierarchy Change |
| Deleting category from category hierarchy: *your category name* | Update Zone For Category Hierarchy Change |

| Job Name | Request Name |
|---|---|
| Removing category from category hierarchy: *your category name* | Update Zone For Category Hierarchy Change |
| Updating category name to:*your category name* | Update Items for Category Rename |
| Modifying category mapping foUpdating descriptor searchability: *your descriptor name* | Populate And Rebuild Intermedia Index For Searchable Change |

**What other jobs can I monitor?**

Besides schema jobs, you can also monitor file upload jobs, page 2-12.

# 6

# Additional Information

## Changing the Session Language

**Translating Data**



**Which data can vary by language?**

The following language-specific fields can be translated in a multiple language installation of Oracle iProcurement:

Punchout catalog definition:

- Catalog Name
- Description
- Keywords

Transparent punchout catalog definition:

- Catalog Name
- Description

Local catalog definition:

- Catalog Name
- Description

Informational catalog definition:

- Catalog Name
- Description
- Keywords

Store definition:

- Store Name
- Store Type *
- Short Description
- Long Description
- Image

Non-catalog request template:

- Template Name
- Organization *
- Item Type *
- Item Description
- Commodity *
- Unit of Measure *
- Negotiated *
- Restrict Suppliers *
- Information Template Name

Base and category descriptors:

- Descriptor name
- Description

Item and browsing categories:

- Category Name
- Description

* The options or values in these fields, such as Yes or No, vary depending on your

session language.

Schema and items that you upload can also be translated. See the Readme files

> **Note:** Translating a catalog definition does not mean that the catalog's contents are automatically translated. It depends on your setup. For example, data in Oracle Purchasing honors the existing translations of the data. If you provided both German and English versions of a category name when defining categories in Oracle Purchasing, then both German and English versions of the category name are available in Oracle iProcurement. In another example, you can translate a punchout catalog's name, but the supplier controls whether the data exists in a particular language.

**How do online translations work?**

The language in which you are currently viewing fields and data in Oracle iProcurement is called the session language. The language in which you first entered the data is the "initial" language.

For example, you have three language installations of Oracle iProcurement - English, French, and Japanese. The first time you enter these fields, your session language is English. The data you enter is propagated to French and Japanese as well as English. Any change you make in English is made in all languages; however, once you change your session language and translate the data, page 6-3, you must maintain that language separately. For example, you change your session language to French and change a catalog name. Later, you change your session language to English and change the catalog's name in English. That change is now made only in English and Japanese. The application detects that you already made a language-specific change to the French version, and no longer propagates changes to French, unless your session language is currently French.

**How do I change the session language and translate my online data?**

To vary online data by language, change the session language:

1. Enter and save the data in one language first. For example, create a store in French.
2. Click "Preferences" at the top of any page.
3. In your general preferences, select the desired language, such as English, and click Apply Changes.
4. Return to the page where you entered the data. For example, return to the page where you defined your store.
5. Translate the language-specific fields to the new language.
6. Save your changes.

# Contact Tech Support

**Contacting Technical Support**

This is a placeholder for catalog management. Create a file detailing the procedure for contacting your technical support group and replace this file.

# Bytes

**What's a Byte?**

A byte can be, but is not necessarily, the same as a character. 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 in the instructions. (For example, a store's Long Description can be a maximum of 2,000 bytes.) How bytes translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

# Part 2

## iProcurement User Help

# 7

# Getting Started

## Overview of Requisitioning

**Overview of Requisitioning**

The purchasing process comprises four phases: requesting your item, approving requisitions, checking the requisition status and receiving the requested items.

How do I order an item?, page 7-1

What happens to a submitted requisition?, page 7-3

How do I check requisition status?, page 7-3

How do I receive my items?, page 13-1

## How do I order an item?

1. Search for the Item, page 7-1
2. Select the item or items and enter item and supplier details, page 7-2
3. Enter Delivery Information, page 7-2
4. Enter Billing Information (Optional), page 7-2
5. Enter Notes and Attachments (Optional), page 7-2
6. Review Approvers, page 7-3
7. Review and Submit the requisition, page 7-3

1. **Search for the Item**

   On the **Shop** page, select the store most likely to have your item, enter descriptive words to identify your item in the search box, and then click Go. You can also enter a part number, supplier, or manufacturer. If you are certain that the item you are looking for does not exist in any catalog, click the Non-Catalog Request tab on the **Shop** page. Non-catalog requests let you request an item that is not in the catalog.

Sometimes the search results contain a link to an external supplier site, page 8-14 where you can find your item.

2. **Select the item or items and enter item and supplier details**

   The **Search Results** page shows all items that match the search words that you entered. Select the desired item and click Add to Cart to add it to your shopping cart. Enter the desired item quantity. (You can compare items for variables such as price and supplier information by clicking Add to Compare, then click Compare in the Compare Items box.) If you are creating a non-catalog request, select a category and enter a detailed description of the item. Click Add to Cart. When you are ready to order, click Proceed to Checkout.

3. **Enter Delivery Information**

   If you have entered Delivery Defaults in your preferences, page 14-1, the delivery information automatically appears. You can verify this information and change it on the requisition. Otherwise, enter the following required information:

   - The date before which you need the delivery.
   - The requester for whom you are requesting the item.
   - The location to which the items are to be delivered.

   See more information about entering delivery details, page 9-9.

4. **Enter Billing Information (Optional)**

   - Accept or change the charge account assigned to you. When you request something, the cost of the items is automatically charged to a charge account that your company has set up for you or your organization. Normally, you use this charge account. To edit or add more charge accounts, click Edit Lines during checkout.
   - Use a corporate credit card (procurement card, or P-Card), or charge to a project. These can also be Billing Defaults in your preferences, page 14-1.
   - Indicate if the requisition is for a taxable or non-taxable item. If you don't know, the Purchasing system defaults to the proper tax status on the requisition before the buyer gets it. Otherwise, the system uses the taxable status you choose here.

5. **Enter Notes and Attachments (Optional)**

   After you enter billing information, you can enter notes or attachments. Notes help you add extra information or special instructions about the requisition.

Attachments contain additional information about your requisition in the form of a file, URL, or text. Your administrator can set up information templates to gather additional information 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. Note that the information template is created as a short text attachment if the size of the attachment does not exceed 4000 bytes. If the size of the attachment exceeds 4000 bytes, then the information template is created as a long text attachment. The catalog content added into shopping cart will be shown as a pop up, when users click or hover on the shopping cart icon. When you add items to the cart, the number (count) is displayed next to shopping cart icon so that you know how many items are added to cart without opening up the pop up. Also a confirmation message is displayed stating that the selected item is added to cart when items are added to cart successfully.

See instructions for entering notes or attachments, page 9-6.

6. **Review Approvers**

   Your company policies determine the approvers for your requisition. Your company specifies approvers for you based on set approval limits, so you do not need to specify approvers. You can review your list of approvers and select additional approvers. You cannot change the mandatory approvers on your list.

   You may, however, be able to add approvers or change the first approver, page 9-13.

7. **Review and Submit the Requisition**

   You can view details of the requisition before submitting it. If all the details are to your satisfaction, you can submit the requisition. To modify a requisition before submitting it, click the Back button on the submit page.

## What happens to a submitted requisition?

After you complete and submit a requisition, your approvers receive it. Upon approval of the requisition, a buyer assigns a purchase order number to the requisition and places it with the supplier.

## How do I check requisition status

See Finding and Tracking Requisitions, page 11-1.

## Related Topics

Frequently Asked Questions, page 7-4

## Frequently Asked Questions

**Shopping**



**Orders**



**How do I request an item I cannot find?**

If the item does not exist in the catalog, place a non-catalog request by clicking the Non-Catalog Request tab on the **Shop** page.

**How do I request a service?**

- Use a non-catalog request, page 8-15 and select a type of Services billed by quantity (such as 10 hours of service at 100 USD an hour) or Goods or services billed by amount (such as 5,000 USD for the service).

- Create a contractor request, page 10-1 for temporary labor, if this feature is enabled. Typically, you use a contractor request to hire a contractor or temporary personnel, whereas a you use non-catalog service request to procure a service (the individual performing the service may be less important than the service itself). Follow your company's procedures.

**Is there a shortcut to reorder a frequently requested item?**

There are two shortcuts:

1. Search for the item, select it, and click Add to Favorites. To use it: select it from the list, add it to the shopping cart, and proceed to checkout.

2. In the Requisitions tab, select a requisition and click Copy to Cart.

**What happens to the approval hierarchy if I add another approver?**

The following example demonstrates how changes that you make to your approver list affect the default approval routing behind the scenes.

**Example:**

The default approval hierarchy setup in Purchasing is:

```
Approver A -> Approver B
```

A requester with the appropriate access privileges in Purchasing adds Approver X resulting in the following approval chain:

```
Approver A-> Approver B -> Approver X
```

Approver B forwards the document to Approver C, who is in another branch of the approval hierarchy:

```
Approver B -> Approver C -> Approver D
```

The final approval routing is:

```
Approver A -> Approver B -> Approver C -> Approver D -> Approver X
```

See more information on adding approvers or changing the first approver, page 9-13.

**What is a procurement card (P-Card)?**

Use P-Cards to purchase items from a supplier and bypass handling individual invoices for high volume items. The types of procurement cards available are:

- An employee corporate credit card.
- A supplier P-Card issued to your organization.

**How do I know a P-Card was applied to my requisition?**

View your requisition by clicking the Requisition number in the Requisitions tab. Click Details for the requisition line and choose to show all information. The line detail appears, including the P-Card Used field. That field should display the P-Card number that you selected while creating your requisition.

**How are my items priced?**

Items are priced from the price list when you create a requisition (using Oracle Purchasing forms or Oracle iProcurement shopping cart pages), import a requisition, or perform requisition processing using WebADI.

Pricing is determined by the profile option PO: Default List Price from validation organization. If the profile option is set to Yes, then prices are defaulted from the price list of the Oracle Inventory master (validation) organization. The validation organization is specified in the Financial Options setup page in Oracle Purchasing. If the value of the profile option is set to No, then prices are defaulted from the destination organization.

The profile option is set at the site, application, responsibility, and user levels, and the default value is No.

Note that even if the value of the profile option is set to Yes, if either the organization or list price is not specified in the Financial Options page, then the price for your item displays a null value.

**How do I request something in another currency?**

Click the Non-Catalog Request tab on the **Shop** page. You can request an item in another currency by using non-catalog requests.

The system uses the appropriate exchange rate information based on the currency that you choose. You can change this information if your administrator has set the following fields to appear in the shopping cart:

- **Exchange Rate Type**: This defaults to the rate type your Purchasing administrator has set up as the default exchange rate type to use. Accept the default, or if you know that you need to use a different rate type, then select it instead.

- **Exchange Rate Date**: This defaults to today's date, the date of the requisition. If this is not the correct exchange rate date, then change it to the exchange rate date in Oracle Purchasing.

- **Exchange Rate**: You can specify the exchange rate only if the Rate Type is User. Otherwise, it is a fixed rate based on the rate type. Anything else that you enter is ignored.

Some items that you find in the catalog can also express their prices in another currency. Only the **Search Results** page and the price you enter on a non-catalog request appear in the foreign currency. Everywhere else on the requisitioning pages, the price appears in the functional currency that your company uses.

# 8

# How to Shop

## Looking for Items

**How do I search for catalog items?**

**Note:** See *Oracle E-Business Suite User's Guide* for detailed information about Oracle Enterprise Command Center.

1. On the **Shop** home page:

   - Select a store. (Only searchable stores are included in the list.) You can search only one store at a time. You can also search for categories, and shopping lists. Use the infolets to view frequently ordered items.

   - Enter a keyword and click Go.

   - To search on part of a word, use a wildcard character, page 8-3. For example, to find ballpoint, enter ball% or ballpoint (not ball). To find pens, enter pen% (not pen).

2. View the search results. The search engine returns items containing all of your keywords. Some stores contain multiple catalogs to maintain items. If so, the **Search Results Summary** page appears first, and shows the first few results from each catalog. Click "View more results" to view, sort, page 8-5, or filter, page 8-6 all results.

Keywords must contain at least one character and typically consist of one or a combination of the following:

- Item description

- Item number

- Supplier name

- Manufacturer name

If you do not like the results returned from this search, you may want to try:

- Wildcard characters, page 8-3.
- Another store.
- Clicking Categories below the Shop tab, to browse categories of items.
- Advanced search, page 8-4.
- Non-catalog request.
- Clicking the link "Look for any of the words, similar words, or spelling variations" below the search results (also known as an expanded search).

> **Note:** The Employee Shopping Tracker dashboard, which is available from the Procurement Command Center displays the data for searches that are performed in the iProcurement Shop page. See Employee Shopping Tracker Dashboard, *Oracle Purchasing User's Guide* for more information.

**Can I use transaction (foreign) currency?**

Click an item name to open the Item Details page. The Item Details page displays the item attributes and their corresponding values.

You can enter transaction (foreign) currency (different from functional currency) for pricing catalog items, that are not linked to an agreement. Select the Currency (for example, AUD, EUR, etc.,). The Exchange Rate Type list of values is displayed. Select the exchange rate type and enter the date of the exchange rate (the Exchange Rate Date is defaulted to the current date).

The Exchange Rate is displayed, depending on the values of the Exchange Rate Type and Exchange Rate Date.

Enter a Price in the transaction currency based on the exchange rate. The corresponding price in USD (the functional or base currency) is already visible on the page.

Enter a Quantity for the item and click Add to Cart. Your item will be added to the cart along with the transaction currency information. If you do not enter a Price in the foreign currency, the system displays an error message, prompting you to enter a non-negative value for the Price field.

Please note that when you add the catalog item to your favorites, the item is added with transaction (foreign) currency details.

**Can I search more than one store?**

You can search only one store at a time.

**Can I use wildcard searches?**

You can use a wildcard character (either the % or the *) in the middle of or after your search character value. For example, a search on o% returns Oracle and Open Markets Inc., and a search on op% returns Open Markets Inc.

**How do I perform an AND or an OR search?**

When you enter keywords in the Search field, it always performs an AND search. For example, entering **red pen** returns items containing the words red and pen. To perform an OR search or a more detailed AND search, use advanced searching, page 8-4.

**Can I enter hyphens or other special characters?**

You can enter the following special characters while searching:

- wildcard characters, page 8-3 (% or *)
- hyphens (-)
- underscores (_)

For example, you can search for **post-it** or **AB_22ZL**. Keywords with hyphens or underscores are treated as whole words. For example, a search on post or AB does not find post-it or AB_22ZL. To search part of a word, use wildcard characters, page 8-3.

Special characters such as a slash (/) and ampersand (&) are ignored. For example, a search on **red, white & green** looks for items containing red and white and green.

If you are searching in a catalog language that uses language-specific characters, the search supports them. See instructions for searching in other languages, page 8-6.

**Is the searching case sensitive?**

No. Entering ab22ZL finds AB22ZL.

**How do I do an advanced search?**

1. On the Shop tab, click "Advanced Search" next to the Search field.
2. Select a store.

   **Note:** Some stores, such as those that access external sites, cannot use advanced searching. These stores do not appear in an advanced search.

3. For at least one of the fields, select a command from the list and enter a search term. (You can use wildcard characters, page 8-3.)
   - with all of the words performs an and search. (The words don't have to occur side by side.)
   - with at least one of the words performs an or search.

- without the words excludes the keywords. In the following example, the search engine finds all pens not manufactured by Acme:- Description: with all of the words: pen. - Manufacturer: without the words: Acme

- with the exact phrase looks for the same keywords, 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 returns 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; for example, entering 1.21 finds items that cost exactly 1.21 (not 1.2134). The search engine looks for the transactional (supplier's) price and currency.

- If you enter advanced search criteria in more than one field, then the system performs an AND search on those terms.

4. If a Flashlight icon appears next to the field, click it to search for and select the internally stored value. (When searching for the value, the search engine performs a begins with search. If you do not know the beginning of the name you are searching for, use a wildcard character--for example, %network.) If you cannot find a value, such as a supplier, it may not exist in that store.

5. Optionally, select an additional field and click Add to search by additional criteria. (You still must enter a search in one of the other fields.)

6. Click Go.

    **Note:** Quick Search exits the advanced search.

**How do I sort my search results?**

1. Perform an item search, page 8-1 to locate items. The simple way to sort results is by clicking on any highlighted column headings. For more complex sorting follow the steps below.

2. Access the **Search Results** page by clicking "View more results."

3. On the **Search Results** page, choose a Sort By option:

    - **Relevance**: Your Search Results appear in order by rank. Rank is based on the number of keyword matches found for an item and the number of times a keyword occurs in the entire catalog.

    - **Other options**: The available options depend on how your system was set up. Most options sort alphabetically. Options like Unit Price sort numerically. Words enclosed in quotation marks and numeric characters appear first.

**Note:** Some catalog search results limit the sorting options.

4. To sort items, select Ascending or Descending next to the Sort By field. Click Go.

For services, which display editable amounts in the search results, the system sorts by the default amount, not the amount that you entered. To sort by amount, select a Sort By of Unit Price.

**How do I filter my search results?**

Filtering your search results enables you to narrow your search by eliminating irrelevant items. When you choose the value by which you want to filter your items, all items that do not match that value are removed from your results.

To filter your item search results:

1. Perform an item search, page 8-1 to locate items.

2. Access the **Search Results** page by clicking "View view more results."

3. On the **Search Results** page, click Add Filter.

   **Note:** Filtering is not always available. Some catalogs do not allow filtering the search results.

4. From the Filter menu, select an attribute to filter by.

5. Click Go.

6. A Filter Results By table lists the filter values. Choose a value to eliminate all results that do not contain that value. For example, if you only want to see items from Acme Supplier, choose Acme Supplier, and then click Apply. All suppliers other than Acme Supplier are eliminated from your results. You can filter by several values simultaneously. For example, if you only want to see items from Acme Supplier, Smith Supplies Inc., and Bargain Supplies, choose all three suppliers in the Filter Results By table, then click Apply.

7. To filter by more than one attribute at a time (for example, by supplier and unit of measure), follow the instructions above. After you click Apply, click Add Filter and follow the instructions again.

To undo or restart filtering click Remove All Filters on the **Search Results** page.

**How do I search in other languages?**

If catalog items exist in multiple languages, you can search for items in a language other than the system's language. For example, if an item exists only in the German version of the catalog, you will not find it unless you change your search language to German.

To change your search language:

1. In the Catalog Language box on the **Shop** home or **Search Results** pages, click "Change Catalog Language." (If you do not see this link, your administrator has hidden it.)

2. On the **Select Catalog Language** page, select the language in which you want to search.

3. Click Apply.

4. Any search is now performed on that language version of the catalog, until you change the language again.

**Why can I not find an item?**

- You are searching on a partial phrase. The search engine returns items that exactly match each keyword. For example, searching for AB does not return item number AB22ZL. Searching for pen does not return pens. Use wildcard characters, page 8-3 (such as AB%) to perform a partial match.

- The item is not in the store you are searching.

- The item is not available to your organization, or you are not authorized to purchase certain items.

- Some catalogs, such as those that access external sites, do not support expanded or advanced searching.

- The purchasing administrator has restricted your access to that category. (Even if the**Advanced Search** page lets you select a restricted category, the items won't appear.)

- The item appears only in a different language version of the catalog.

**Why does the item information sometimes vary?**

Some items are services, which can display an amount instead of a quantity and price. For some services, you can change this amount just like you can change the quantity on a goods item before adding it to the cart.

**How do I use the What do you need to buy today? search feature**

If you have configured iProcurement to use the ECC framework, then you can use the search-based shopping feature in Oracle iProcurement. For more information on how to configure iProcurement for ECC, see "Set Up Search-Based Shopping in iProcurement", *Oracle iProcurement Implementation and Administration Guide*.

> **Note:** You must complete the Search-Based Shopping in iProcurement

configuration and setup after the installation and common configurations are completed as described in My Oracle Support Knowledge Document 2495053.1 *Installing Oracle Enterprise Command Center Framework, Release 12.2*.

The **Home** page, accessible from the **Shop** tab, enables you to search all items by using the catalog item name, or generic name, using the search feature **What do you want to buy today?**. The **All** drop-down list displays shopping category names that are used to filter your search.

In addition to keyword searches, you can also upload an image from your local folder. To upload the image, click the **Image Search** icon and either upload the image or drag and drop it. The system will then analyze the image and display relevant search results based on the visual context, providing an alternative way to search for items without needing to know the item name or catalog details.

The search feature enables you to search for any item without first choosing the appropriate catalog, therefore you are not required to know the store from which the item is sourced. The search results display results from every eligible source, regardless of where the data is hosted.

Use the search box to search for and refine (filter) the data in the results table. You can select a value or record from the **Available Refinements** options, such as **Browse By** and **Filters**. The Filters refinement includes categories such as content type, item number, supplier contract, location, supplier part number, manufacturer, price, and so on. You can also use the **Search** field to find a keyword, a value, or a specific record. When you submit a search, or select an available refinement, the search term or refinement is added to the **Selected Refinements** list, and all of the data is refined. Use **Saved Search** to create and save your search. You can edit, delete, or refer to this saved search.

Use an asterisk (*) or a percent sign (%) to perform a partial keyword or record search that matches any string of zero or more characters. You can also use a question mark (?) to perform a partial search that matches any single character.

The **Results** table displays results based on refinements such as items, details of the item, content type, item rating, supplier information, manufacturer information, and so on.

For additional ECC overview information, see Overview of Oracle Enterprise Command Centers, *Oracle E-Business Suite User's Guide*.

**Additional Information:** For more information about searching for and refining data in Oracle Enterprise Command Centers, see "Search" under Highlights of an Enterprise Command Center, *Oracle E-Business Suite User's Guide*.

**How do I use the purchasing news region?**

The purchasing news region enables you to view procurement related news for your company, such as your company's purchasing policy, procurement alerts for your company, and so on.

**What are Popular Categories?**

The **Popular Categories** region enables you to view the most popular categories searched for by requesters in your company.

**What are Frequently Requested Items?**

The **Frequently Requested Items** region enables you to view the most popular items purchased by you or your business group. Set the profile option POR: Display Top Categories and Frequently Requested Items in ECC Shopping Page to Employee to view your popular items and frequently requested items.

> **Note:** For more information about this profile option, see *Oracle iProcurement Implementation and Administration Guide*.

Click the item name link to view the **Item Details** page for that item.

The **Item Details** page contains item information such as price, shopping category, supplier, supplier site, and so on.

For the selected item, specify the required quantity then click **Add to Cart**, or **Add to Favorites**.

**How do I view my recently created requisitions?**

View your recently created requisitions in the **My Requisitions** region, where you perform actions such as **View** (requisition details), **Change**, **Copy**, or **Express Receive**.

Select the **Full List** action from the **Options** menu to view all of your requisitions on the **Requisitions** page.

You can also view all your requisitions by navigating to the **Requisitions** tab.

(N): **Requisitions** > **Requisitions**

**How can I access my latest approval notifications?**

Access your latest approval notifications in the **My Notification** region. You can view the operating unit in the notification subject of a purchase requisition.

Click the notification description to view the details of the selected notification in the **Notifications** tab. On the **Notification** tab, click **Return to Worklist** to view all your notifications in the **Worklist**.

You can also view all your notifications by navigating to the **Notifications** tab.

(N): **Requisitions** > **Notifications**

**How do I use the Results table?**

In the **Results** table, scroll down to view the entire list of items in the search results.

Use the **Results** table to view search results for items, details of items, item and supplier ratings, supplier information, and to perform actions on those items. Additional supplier information is available as icons with tooltips above each supplier name (for example, Green Supplier, Preferred Supplier, Eco Friendly Supplier, and so on). The application uses relevance ranking to display the items on the page. Relevance ranking is a combination of system scoring and weightage. The highest ranked items and suppliers are displayed first on the page, followed by the other items and suppliers in ascending order. System scores are calculated based on the occurrence of matched text, and weightage given to descriptors (such as Preferred Supplier, Green Supplier and so on).

> **Note:** To further refine the results, see: **How do I use the What do you need to buy today? search feature**

Select the check box in the **Results** table to choose an item. You can perform actions on the selected items. Use the **Compare** action from the **Options** menu to compare two or more items. To view item details, click the item name link. The items details are displayed as columns. You can search for a specific item attribute (such as price or description), and view it by entering the **Item Attribute** name in the Type to filter by attribute filter field. Use the Actions drop down to highlight the differences between various item attributes, or to reset the compare view to default. Click **Return** to go back to the **Results** table.

Click **Add to Favorites** to add your item to the Favorite list. A confirmation message appears, informing you that you have added the item to the Favorites.

**How do I add items to my cart?**

To add items to your shopping cart:

- Select the check box or click anywhere in the row to highlight and select the row.
- Use the Quantity field to modify the quantity you require.
- Click **Add to Cart** to add the item(s) individually to the shopping cart. A confirmation message is displayed informing you that the items have been successfully added to the cart.
- Click **Shopping Cart** to view your cart items, and proceed with the checkout. For more information on checking out items, see: Checking out items in a single step, page 9-7.

**How do I request services from the shopping page?**

To request a service, such as consulting. from the shopping page:

- From the **Home** page, search for the required service.
- Click the service name link in the **Results** table.

- Enter service details in the dialog box.
- Click **Add to Cart and Next**or **Add to Cart and New**.
    - Use **Add to Cart and Next** to add the non-catalog item to the cart and to retain the values you entered on the **Non-Catalog Request** page.
    - Use **Add to Cart and New** to add the non-catalog item to the cart and to refresh the values you entered on the **Non-Catalog Request** page.
- Click **Shopping Cart** to view your cart and proceed with the checkout.

**Using Ratings and Reviews**

Click the item name link to open the Item Details, and the Ratings and Reviews tabs. The Ratings and Reviews tab enables requesters to get recommendations on the best products / services to buy that match requester's need. Organizations greatly value feedback and rating others provide on the products which they have already bought. This enables the user community to provide feedback about item/services to the procurement department (Buyer) to tell them that they have negotiated pricing for the goods & services. Buyers can access the review comments and ratings via the Procurement Command Center to know the review trends are positive or negative. The Ratings and Reviews tab displays the following information:

- Submit a Review – click this button whether you have purchased the item or not, and would like to post a review. A pop-up window displays, where you can enter details of your review and submit it. This is the pop up where user (as a reviewer) can provide the Item review and Supplier review. If there is no supplier available for the item, then supplier rating and supplier review region will not be shown. Once a review is submitted, an FYI Notification is sent to users who have subscribed for this item. When you provide a review, it is mandatory to give a rating. It is also mandatory to enter either a review title or a review comment.

  The Review popup has two regions Item Region and Supplier Region. Both regions have ratings, review title, review comments and a Do you own this item field, which has the values Purchased at work, Not Purchased, or For Personal Use.

- Submit a Query – click this button if you want to get more information about the item or the supplier. A pop-up window displays where you can enter your query and submit it.
- Item Ratings – the horizontal bar chart displays cumulative ratings provided by users for the item. If you click on the individual rating, then the reviews region displays only those items with the rating you selected.

- Supplier Rating – the horizontal bar chart displays cumulative ratings provides by users for the supplier. If you click on the individual rating, then the reviews region displays only those suppliers with the rating you selected. If there is no supplier for an item (inventory item without supplier), then supplier ratings will not be shown.
- Average Item Rating – displays the average item rating.
- Average Supplier Rating – displays the average supplier rating
- Users have requested this item – displays the number of times users have requested the item.
- Do you want to be notified when people submit Reviews for this Item/Supplier – select Yes or No to choose if you want to be notified when other people submit reviews for the item or the supplier. You can subscribe to individual review or query. If you have not subscribed at header level and only for individual review/query, then only when the particular review/query is answered, you will be notified.
- Show - choose the reviews you want to view using the list of values available.
- Review – displays the reviews for the item. Click a review to view details of the review. Users can respond to a query posted or provide additional comments. Users can raise a question or clarification. Any user who has the access to this item can respond to a query. Notification will be sent on every update of Review/Query to the subscribed users. Ratings and reviews can be accessed by buyers through the Procurement Command Center.

## Shopping Lists

**Shopping Lists**



**What is a shopping list?**

It contains information on the items frequently requested. The types include: Public and Personal Favorites.

**How is a public shopping list different from personal favorites?**

If you see shopping lists other than personal favorites, then your company has created public lists for frequently needed items. Personal favorites is a list that you created by clicking Add to Favorites (for example, on the **Search Results** page).

**How do I create My Favorites list?**

Search for the items you frequently request, select them, and click Add to Favorites. You can also save items from a non-catalog request.

You can create additional personal favorite lists in iProcurement Preferences. See: Setting Preferences, *Oracle iProucrement User Help*.

**How do I filter the items in shopping list favorites?**

Use **Add Filter** to refine your search for shopping list favorites. Refining your search results enables you to eliminate irrelevant items. When you select an attribute to filter your items, the system displays the relevant results for that attribute.

**To filter the search results:**

1. On the **Shopping List** page, select **Personal Favorites** from the **Select List**.
2. Click **Go**.
3. Click **Add Filter**, to refine your search.
4. Select an attribute from **Filter search results by** list.
5. Click **Go**.
6. Select a value from the **Filter results table** for which you want to view relevant searches. You can select multiple values.
7. Click **Apply**.
8. Click **Remove All Filters** to undo or restart filtering.

> **Note:** You can filter multiple attributes at a time. After you click **Apply**, click **Add Filter** and follow the steps.

**Why should I use a shopping list?**

It speeds the requisitioning process:

- Your favorites list enables you to bypass the search process for locating and selecting items.
- The corporate shopping list ensures you are requesting items from approved suppliers.

**How do I access these shopping lists?**

Click "Shopping Lists" on the **Shop** page.

**Why can I not add some items to my favorites lists?**

You can add some items to your favorites list only from the shopping cart rather than from the search results, if your administrator has set up the system to allow this.

If you see a disabled favorites list icon, then the item has a supplier configuration number (which might not appear). For example, personal computers are often configurable, and each configuration has a unique number. You cannot add these items to your favorites list.

## Related Topics

Shopping at Supplier Sites, page 8-14

# Shopping at Supplier Sites

**Shopping at Supplier Sites**



**Can I shop at any Internet shopping site?**

You can shop only at sites to which Oracle iProcurement directs you through a link. Your administrator set up these sites.

**How do I shop at a supplier site?**

Any store can contain, or directly link to, an external site. Your company and the supplier set up the site to automatically return you to Oracle iProcurement when you finish shopping. The goods from the site automatically appear in your shopping cart, page 9-1.

**How do I check out goods bought from a supplier site?**

When you have returned to iProcurement, click Checkout to process your requisition. Your shopping cart can contain items from external supplier sites or from your organization's catalogs.

**Can I change the items I ordered from the supplier site?**

It depends on how your administrator set up access to the site. If the supplier does not want you to change the quantity after leaving its site, then Oracle iProcurement does not allow you to update the quantity.

If your item was configured on the supplier site (for example, you configured your own computer), then often you cannot change this information after leaving the site.

See also information on linked item descriptions, page 9-3.

**Why do I get an error when accessing the supplier site?**

If you receive a message that the supplier site is not responding or cannot be reached, then something is wrong with the connection between Oracle iProcurement and the site. Try again later.

If you receive a message that the user name or password is incorrect, then your administrator needs to verify the setup for the site.

Contact your purchasing or system administrator for problems accessing the supplier site.

## Non-Catalog Requests

**Non-Catalog Requests**



**How do I use non-catalog requests?**

Non-catalog requests help you purchase goods and services not available in the catalog. You can use non-catalog requests to order:

- Goods billed by quantity.
- Service billed by quantity.
- Goods or services billed as an amount.

If your company created multiple non-catalog request templates, then you must select a request type.

**How do I add my non-catalog items to the cart?**

To add non-catalog items to your shopping cart:

- Select the check box or click anywhere in the row to highlight and select the row.
- Use the Quantity field to modify the quantity you require.
- Click **Add to Cart and New** or **Add to Cart and Next** to add the items individually to the shopping cart. A confirmation message is displayed informing you that the items have been successfully added to the cart.
    - Use **Add to Cart and Next** to add the non-catalog item to the cart and to retain the values you entered on the **Non-Catalog Request** page.
    - Use **Add to Cart and New** to add the non-catalog item to the cart and to refresh the values you entered on the **Non-Catalog Request** page.
- Click **Shopping Cart** to view your cart items, and proceed with the checkout. For more information on checking out items, see: Checking out items in a single step, page 9-7.

**Why can I not update some fields?**

You company can customize the non-catalog request page. If so, then your company may not allow some fields to be changed.

**Can I use transaction (foreign) currency in Non-Catalog Requests?**

Transaction currency (such as AUD, SGD, CAD) can be used in a catalog request.

In addition, when you edit a non-catalog request, the following transaction currency fields are available for you to use, to complete the non-catalog request creation with another transaction currency.

- Quantity
- Unit Price
- Currency
- Exchange Rate Type
- Exchange Rate Date
- Exchange Rate (as per the Exchange Rate Type selection)

If the supplier and the supplier site are entered, then the default currency is displayed which is based on the OU, Supplier Name, or Site (supplier site) respectively.

Otherwise, it defaults from the preferences.

**Why do the non-catalog request fields differ?**

Your company can display different non-catalog request fields depending on the store. The fields also vary depending on the Request Type chosen.

**How does a non-catalog request differ from a catalog request?**

Your company maintains a catalog of items, item information, and preferred supplier information. When searching, you search this online catalog. Use non-catalog requests to request items that are not available in this catalog.

**What does the New Supplier check box do?**

If you enter supplier information for a non-catalog request, selecting the New Supplier check box tells iProcurement not to validate the supplier. This allows you to enter a name for suppliers that are not yet approved for use by your organization. It does not add them to your supplier base.

**Is the requisitioning process different for a non-catalog request?**

The requisitioning process for catalog and non-catalog request items are similar except that for a catalog item, you search for the catalog item online and select it while for a non-catalog request, you enter the item information yourself. In both cases, the checkout process is the same.

**Could I receive notifications about a purchase order created from the requisition?**

**Notify me with status updates for my Purchase Order**: If this checkbox is selected, the requester receives a notification when a purchase order is created, or approved. By default, this checkbox is selected, because the selection defaults from the **iProcurement Preferences** page.

**How do I check for similar catalog items?**

To check for similar catalog items when you create a non-catalog request, use the profile option **POR: Force User to Auto Suggest Page in NCR Flow**.

- If this profile option is set to Yes, then when you try to create a non-catalog request you are automatically redirected to the **Check Catalog for Similar Items** page when you add an item to the cart.

- If this profile option is set to No, then you must click **Check Catalog for Similar Items** on the **Non-Catalog for Similar Items** page to view similar catalog items.

For more information on this profile option, see *Oracle iProcurement Implementation and Administration Guide*.

The **Check Catalog for Similar Items** displays your non-catalog request details and the suggested catalog items. The suggestions are based on details like the description you enter in the non-catalog request.

Optionally, to request that the buyer add this non-catalog request to the catalog, select the check box **Please add this Non-Catalog Request to a catalog for future orders**. To check the progress of your request, click **Feedback**.

> **Note:** Search-Based Shopping in Oracle iProcurement is available through Oracle Enterprise Command Center. For more information on Installation and common configurations, see: My Oracle Support Knowledge Document 2495053.1, *Installing Oracle Enterprise Command Center Framework, Release 12.2*.

### Related Topics

Spot Buy Using Non-Catalog Requests, page 8-18

## Spot Buy Using Non-Catalog Requests

Spot Buy contributes a certain percentage of indirect spend. These items are not sourced, business critical and the requester needs it. These are typically low Spend items, project based purchase with high volume transactions and too costly to involve sourcing and procurement organizations. Spot Buy is defined as non budgeted spend and are mostly non-catalog requests with most being sourced with a few bids and one buy.

Certain business users have the buying insight and authority to place purchase orders for their needs. The spot buy feature empowers requestors to convert requisitions to purchase orders using the "few bids and one buy" approach.

When Spot Buy is set up for a user/role, the **Non-Catalog Request** page shows several options, that you can use to complete a spot buy requisition.

When you click the **Non-Catalog Request** tab, the following conditions determine what is displayed on the page:

- If you have a spot buy access role, and if the profile option POR: Use Modernized User Interface for Non Catalog Request is set to Yes, the **Category Search** page displays, along with the checkbox **Automatically Create a Purchase Order**.

- If you have a spot buy access role, and if the profile option POR: Use Modernized User Interface for Non Catalog Request is set to No, the **Category Search** page, along with the **Find Your Supplier** region does not display. However, the checkbox **Automatically Create a Purchase Order**is displayed.

- If you do not have a spot buy access role, and if the profile option POR: Use Modernized User Interface for Non Catalog Request is set to Yes, the **Category Search**page and **Find Your Supplier** region display. The checkbox **Automatically Create a Purchase Order** does not display.

- If you do not have a spot buy access role, and if the profile option POR: Use Modernized User Interface for Non Catalog Request is set to No, the **Category**

**Search** page and **Find Your Supplier** region do not display. The checkbox **Automatically Create a Purchase Order**does not display.

To create a spot buy requisition:

1. Use the following dropdown values in the **Non-Catalog Request** page. Select one of the following in response to the question: **What do you need to request?**

   - Goods. I can provide a description, item price, and quantity. (Line Type: Goods billed by Quantity)

   - Goods or Services. I can provide a description and a total amount. (Line Type: Goods or services billed by Amount)

   - Services. I can provide a description/statement of work, rate and quantity (Line Type: Services billed by Quantity)

2. Enter the category name in the field next to the question, and click **Go**. You can enter category, or category description, or commodity in the keyword search field for category search.

   The table displays the category, description, commodity, and spot buy threshold limit values (the functional currency is displayed here).

   > **Note:** The spot buy threshold limit is displayed when the ICX Spot Buy Access Role is granted to the user. The limit can be rendered on the page using personalization, depending on your business requirements. The buying organization determines the spot buy threshold limit, which limits the amount based on the user and the category. The buying organization can choose whether to display the threshold limit to requesters. This helps to control the spend limit.

   Select a **Category** by clicking the radio button.

   > **Note:** To create a spot buy request, you must specify the **Spot Buy Threshold Limit** for category.

3. Below the table is a set of three options that pertain to supplier selection. The question

   **Have you already found a supplier for the goods or services you need?**

   requires that you select one of the three options as a response:

   - **No, I do not know which supplier to use**: this response opens the **Non-Catalog Request** page with no supplier related fields. Thus you can create the Non-

Catalog Request with no supplier, however, the buyer will need to specify a supplier in Demand Workbench, when the buyer autocreates the requisition to a purchase order.

- **Yes, I already have a particular supplier in mind**: this response opens the **Non-Catalog Request** page with the fields for the supplier entry visible and enabled.

  Use the **Find Your Supplier** region to select a supplier. If you wish to suggest a supplier who does not exist in the system, click the link in If you cannot find your supplier click here to setup a new supplier. This link enables you to create, invite, or register a new supplier for the spot buy requisition. The link is personalizable, that is, you can hide/show it as per your requirement. The requisition is sent to Demand Workbench, where the system autocreates the requisition to a purchase order.

  If you have a spot buy access role, you can create supplier details in the system. To invite suppliers, you need any requester role, and an Oracle iSupplier Portal licence. To register suppliers, you need any requester role, and access to the **Non-Catalog Request** page.

  The **Onboard New Supplier** page appears, where you need to enter new supplier details such as supplier name, justification, address, and contact information. The value of the **Registration Purpose** column is defaulted, depending on the following conditions: In the **Non-Catalog Request** page, if you click the checkbox **Automatically Create a Purchase Order**, the value of **Registration Purpose** is defaulted to Spot Buy Request (non-editable value). However, in the **Non-Catalog Request**page, if you do not click the checkbox **Automatically Create a Purchase Order**, the value of **Registration Purpose** defaults to Non-Catalog Request (non-editable value).

  In the Tax Details region, you can enter tax-related information for the supplier, including Tax Country, Taxpayer ID, Tax Registration Number, and D-U-N-S Number. This region is optional. A buyer can enter the supplier's tax information at a later time. For more information about entering tax information, refer to *Oracle Supplier Lifecycle Management User Guide.*

  If you do not enter tax information while registering the supplier, you can add this information at a later point in time. Note that if tax details are not entered, and if you click Register Supplier, the supplier registration request has a status of Draft.

  Click Register Supplier to proceed with the supplier registration.

  Click the **I agree to the terms and conditions** checkbox in order to proceed with creating, registering, or inviting suppliers. Click **Create**, **Invite**, or **Register**, depending on your requirement. The new suppliers are created, registered or invited and their information is updated in the **Non-Catalog Request** page. Newly created suppliers have a supplier status of Approved. Successfully invited or registered suppliers have a supplier status of Supplier to Provide

Details. Other supplier statuses for onboarded suppliers are: Pending Approval, Approved, Rejected, Active (for existing suppliers). When supplier onboarding is complete, you can proceed with adding to cart and checking out.

- **Yes, I have got pricing from multiple suppliers**: this response displays a table in the **Non-Catalog Request** page, where you can add multiple suppliers (who exist in the system), rank them and enter the prices they have quoted.

  First enter your item information, and then scroll down to the suppliers table. Click the **Add Rows** icon (with the green plus sign) to add a new row for your supplier. Select the supplier name, enter the price, promised date and rank. The rank for each supplier should be unique (for example: if you have three suppliers, their ranks might be 1, 2,3…). If you wish to order from the supplier (s), select the **Order From** checkbox. Click the **Update** icon to open the **Update Supplier** popup, in order to enter the contact details for the supplier.

  Please note that requesters with a spot buy role can create suppliers when the multiple supplier table is displayed. However, requesters without a spot buy role cannot onboard a supplier.

4. The **Supplier On-boarding Policy News** region enables organizations to add their policies and other useful information about the supplier on-boarding process.

   Note that the price can be in transaction currency, that may be different from the functional currency. However the **Amount** column shows you the value in the functional currency only.

5. Select the **Automatically create a Purchase Order when my requisition is approved**checkbox to send the requisition to Demand Workbench, where the system autocreates the requisition to a purchase order. If the requester has a Spot Buy role, and if the requisition amount is within the threshold limit, a purchase order is created automatically when the requisition is approved.

6. Click **Add to Cart** when you are done. The items will be added to your cart.

   You can proceed to checkout the same way that you would do for a regular Non-Catalog Request.

   The **Requisition Summary** page, **Shopping Cart** page, and **Edit Lines** page display an indicator for Spot Buy items, which lets you know that the requisition is a Spot Buy requisition.

7. Requisition lines may be spot buy lines or non-spot buy lines. When the requisition is submitted, the spot buy lines are automatically created to a purchase order, if all the setup steps for spot buy are complete. For non-spot buy lines, the buyer needs to autocreate the requisition lines to a purchase order in Demand Workbench.

When copying a spot buy requisition, the system automatically copies the value of the checkbox Automatically create a Purchase Order when my requisition is approved.

When you create a spot buy requisition with a Smart Form category, the system enables the spot buy requisition as a requisition that can be referenced in purchase orders.

For more information on autocreating purchase orders from spot buy requisitions, see: *Oracle Purchasing User's Guide*.

For more information on setting up Spot Buy, see: *Oracle iProcurement Implementation and Administration Guide.*

# 9

# Creating Requisitions

## Your Shopping Cart

**Your Cart**



**Internal Items**

**How do I access a current or saved shopping cart?**

Click "Shopping Cart" at the top of any page, or click View Cart and Checkout on the **Shop** pages.

**How do I save a cart? Where does it go?**

Access the current cart, page 9-2 and click Save. Saved carts appear on the Requisitions tab, in an Incomplete status. Select the incomplete requisition and click Complete when you are ready to check out.

**What happens to my current shopping cart when I do other things?**

The cart is still there. If any activity affects the cart, the system informs you. For example, it may ask you to save your cart, or allow you to add items to it.

**Does the cart go away when I log out?**

If you leave items in the cart when you check out, they are still there when you log back in.

> **Note:** As soon as you click Add to Cart, the item stays in the cart until you delete it.

**How do I empty my cart?**

Access the current cart, page 9-2 and click the Delete icon for each line.

**Can I modify a saved cart?**

Yes, you can make changes during the checkout process.

**Why is the price that appears on the search results page different than the price in the shopping cart?**

The system may have automatically applied price breaks or discounts, based on quantity, your location, or other factors.

The final price for an internally sourced item is based on the source organization's cost price. For an internally sourced item, the price that appears on the search results page is the price associated with the external supplier. If the item is strictly internally sourced, then the price is blank. In either case, the price of an internally sourced item on the shopping cart may differ from what appears on the search results page

**Can I view item prices in a transaction (foreign) currency, that is different from the functional or base currency?**

You can create requisitions for catalog items or non-catalog items or contractor requests in a transaction currency (for example: CAD, EUR) that is different from the functional or base currency (for example: USD).

You can see the transaction currency in the shopping cart page along with the functional currency for the item.

The **Edit and Submit Requisition** page displays the **Price** and **Amount** in the transaction currency. Additionally, the amount (of the base currency) is displayed in the **Amount** column.

**Why are some item descriptions linked?**

Sometimes an item's description is hyperlinked if the item was obtained from an external supplier site. If so, click the link any time to revisit the item details on the supplier site. Whether the description is linked depends on whether the supplier allows it.

> **Note:** You cannot change these item details, even if the supplier site allows you. These changes are not returned to Oracle iProcurement. To change the item's characteristics, delete the item and re-access the supplier site to order the item.

**Why do I sometimes see edit and copy functions?**

For contractor requests, page 10-1 only, the shopping cart includes editing and copying capabilities because you cannot edit some fields when you start checkout.

**How do I use Information Templates?**

iProcurement uses information templates to pass additional required information to the supplier. For example, if you are ordering business cards, the card information (name, address etc) would constitute the additional information that needs to be captured by the information template.

Information Templates are set up in Purchasing. Using a Purchasing responsibility, navigate to Setup > Information Templates. Enter the Attributes you want to see appearing on the information template as additional information about the item. Associate the information template with an item or item category using (B) Associate Template.

In iProcurement, when you create a requisition for an item or item template associated with it, you are prompted to enter additional information based on the attributes you entered in the Information Template setup. Note that the information template is created as a short text attachment if the size of the attachment does not exceed 4000 bytes. If the size of the attachment exceeds 4000 bytes, then the information template is created as a long text attachment.

Refer to the *iProcurement Implemenatation and Administration Guide* for more details.

**Why can I not edit the quantity?**

You cannot edit the quantity for contractor requests, page 10-1. Contractor requests are for hiring contractors based on the amount they charge, not quantity.

**How is the source of supply for an internal item determined?**

Sourcing rules that your procurement administrators have created determine if a given supplier or an internal organization supplies the item, depending on its rank in the sourcing rule. If an item is strictly internally orderable, then the organization with the highest allocation defined on the sourcing rule is used.

**Why can the application not find an internal source for me?**

Sourcing rules must be defined for the system to determine the source for your internally orderable item. If sourcing rules have not been defined or if the item is not properly defined in the default source organization, then no internal source can be the default value.

**Can requisitions contain both internally sourced lines and supplier sourced lines?**

Yes, a single requisition can contain both types of lines. The profile PO: Legal Requisition Type must be set to Both.

**How do I edit the unit price and supplier information for inventory items?**

Oracle iProcurement enables requesters to:

- Update the price for inventory items in the Shopping Cart and Change Requisition: Enter Changes pages. Price can be updated only for inventory items that are not linked to a blanket purchase agreement. Administrators can enable editing of the Price field by setting the POR: Allow Unit Price Update for Catalog Items profile option to Yes. When this field is made editable, you can edit the value that defaults from the unit price. You must provide a value as this field is mandatory. Approvers can also update the price if they choose to edit the requisition from the approval notification. Refer to the *Oracle iProcurement Implementation and Administration Guide* for more details about the profile option.

- Edit the New Supplier (check box) Supplier, Site, Contact Name, Phone, Fax, and Email fields, when updating a single line of a requisition in the Requisition Information: Update Selected Line page. Administrators can make these fields editable using the Personalization feature.

## Related Topics

Emergency Requisitions, page 9-15

Estimated Taxes, page 9-16

Enterprise Asset Management, page 9-16

Oracle Process Manufacturing - Outside Processing (OPM-OSP), page 9-17

# Checkout

**Checkout**

**Requisition Information (Step 1 of 3)**

Why do some items have no price?, page 9-6

What happens to a submitted requisition?, page 7-1

Why are some item descriptions linked?, page 9-3

**Why do some items have no price?**

When your search results contain items that are internally orderable and non-purchasable, you will not see any prices for these items because the price is determined by the inventory organization that sources the item, and that organization is unknown until you add the item to your shopping cart. Once the items have been added to your shopping cart, you see their prices.

Optionally, click on the Select Source link to manually select the item source and price.

**Do I have to edit lines?**

Edit lines if you want to do any of the following:

- Edit the default account information. This information is already entered for you, based on your preferences, page 14-1 and system setup, but you can change it.
- View additional line details. The first step of the checkout process shows only fields that apply to all lines.
- Vary information (such as delivery information) by line.
- Add line-level attachments.

The line you select for editing shows you the Quantity and Amount (in the transaction currency), which you can update.

In the Item region, the Update Line page displays the Unit Price and Amount in the transaction currency (for example: AUD, CAD, EUR). The Exchange Rate details (Exchange Rate, Exchange Rate Type, Exchange Rate Date) are also displayed in this region.

**How do I enter notes or attachments?**

Entering notes or attachments is optional.

To enter notes:

1. Go to the second step of the checkout.
2. Enter a justification (which is a note to the approver) or a note to the buyer.
3. Depending on how your administrator configured the system, you may also be able to enter a note to the supplier or receiver.

To enter attachments:

1. In the first step of the checkout, do either:
    - Click Next to go to the second step of the checkout.

- Click Edit Lines. Click the Attachments subtab.

2. Click Add Attachments.

   **Note:** The Add From Document Catalog option at the top of the attachments page enables you to select an attachment from a document catalog, if your company created one.

3. Select a Category:

   - Internal to Requisition. The attachment is not carried over to the purchase order. Only you and requisition approvers see the attachment.

   - All other categories place the attachment both on the requisition and the resulting purchase order.

4. Define your attachment as one of the following:

   - Select File and browse for the file.

   - Select URL and enter the URL.

   - Select Text and enter the text.

**Can I modify the assigned source information?**

If the administrator has given you the authority to modify the source information, then access the Select Item Source Information page by clicking Click here to select a source on the Search Results page.

**Can I add an item to the cart after I start the checkout?**

You can go back to the **Shop** page and add additional items any time during the checkout. The items you started to check out remain in the cart. However, you will lose any information (for example, charge account information) you entered during the checkout.

**Can I create a purchase order automatically when my requisition is approved?**

Yes. To automatically create a purchase order after the requisition has been approved, select the checkbox **Automatically create Purchase Order when my Requisition is approved**.

**Can I checkout an item and submit it in one step?**

Yes. Once you have added items to the cart, perform the following steps:

1. Click **View Cart and Checkout** in the **Shopping Cart** region. The **Shopping Cart** popup window opens.

2. View and update the description, justification, **When do you need these items?** (Need-By Date) field, and **Where do they need to be delivered?** (Deliver-To Location) field. If the Need-By Date has multiple values, the **Multiple** link is displayed at that field.

   Enter an item, and it's description. You can update the item description as required, you can add or remove text to make the item description available with more clarity. In Oracle Inventory, if the Item Master (Purchasing tab) control, Allow Description Update, is enabled, you can update the item description in the Shopping Cart popup.

   You can also click the **Show Delivery and Billing** link to display Delivery and Billing details such as:

   - **Urgent –** Select this check box if the delivery is urgent.
   - **Requester –** This field displays the name of the requester. You can change this if required.
   - **Deliver to Inventory –** This check box is selected by default.
   - **Subinventory** – This field displays the current subinventory. You can change this if required.
   - **I need a purchase order number immediately** – Select this check box if you require a purchase order number immediately. If you select this check box, a purchase order number is assigned after you click Submit.
   - **P-Card –** Select the p-card number from the list of values if required.
   - **Project –** Select a project from the list of values if required.
   - **Task –** Enter a task if required.
   - **Notify me with status updates for my Purchase Order**- If this checkbox is selected, the requester receives a notification when a purchase order is created, or approved.

3. Click **Return** to go back to the **iProcurement Home** page.

4. Click **Edit** to update details of items in the cart. The **Edit and Submit Requisitions** page appears. Use this page to edit the details of any line item. You can update the line description of the item as well, provided the Oracle Inventory control (Allow Description Update) is enabled in the Oracle Inventory Item Master form (Purchasing tab). You can also edit the item number in this page. You can also update details across multiple lines by selecting the relevant lines and clicking **Update**. The **Requisition Information: Update Selected Lines** popup window appears, to display only those fields that apply to all lines. Make the updates you

require and click **Apply**.

5. Click **Save**.

6. Click **Submit**.

**What delivery information do I need to enter?**

- Need-by Date: The date by which you need the delivery.

  > **Note:** For more information, see: Where do I view Need-By Date details and how is it calculated?, page 9-9

- The requester for whom you are requesting the item.

- The location to which the items are to be delivered. Unless your administrator configured the system to disallow it, you can override your default location and specify a new location.

  > **Note:** You cannot change the delivery information for contractor requests, page 10-1.

**Where do I view Need-By Date details and how is it calculated?**

1. To access your requisition, click the requisition link from the **Requisitions** page.

2. Click **Line Detail Image** icon from the **Details** region in the **View Requisition** page.

3. Click **Show Additional Information** from the **Requisition Details** page.

4. You can view the **Need-By Date** in the **Item Information** region.

   > **Note:** The Lead Time Days and Offset Days succeeding the Need-By Date field displays the calculation of the Need-By date. You can also personalize the Lead Time Days and Offset Day on the View Requisition page.

Calculating Need-By Date

- **Non-Catalog Request**: Need-by Date = System Date + Non-Catalog Offset Value

- **Catalog Request**:

  - If the lead time is specified in the agreement, then the Need-by Date = System Date + Lead Time from Agreement + Catalog Offset Value.

- If there is no lead time specified in the agreement, but it is specified in item, then the Need-by Date = System Date + Lead Time from Item + Catalog Offset Value.
- If there is no lead time available for both the agreement and the item, then the Need-by Date = System date + Offset Value.

- **Punchout**:
  - If the cXML file contains a lead time, then the Need-by Date = System Date + Lead Time from cXML + Punchout Offset Value.
  - If the cXML file does not contain a lead time, but the agreement referred to while creating the Punchout has the lead time, then the Need-by Date = System Date + Lead Time from Agreement + Punchout Offset Value.
  - If there is no lead time specified in the agreement, but the item available in the agreement has a lead time, then the Need-by Date = System Date + Lead Time from Item + Punchout Offset Value.
  - If the cXML and the agreement or item available in the agreement do not have a lead time, then the Need-by Date = System Date + Punchout Offset Value.

**Can I check out a number of items with different delivery information for individual items?**

1. In the first step of the checkout, click Edit Lines.
2. Click Return to continue the checkout.

**How do I deliver to different subinventories in one requisition?**

1. Make sure that Delivery to subinventory is selected in your preferences, page 14-1 .
2. In the first step of the checkout, click Deliver to Inventory.

   **Note:** You see this check box only for inventory items, and only if a deliver-to location (not a one-time address) is selected.

3. Click Edit Lines and select a subinventory for each line. Select a deliver-to location. Specify the destination type as Inventory.
4. Change the subinventory.

**Can I split distributions for requisition lines?**

You can split distributions for catalog requisitions if the value of the Destination column is Inventory and the Deliver-To Location is selected. In the Billing subtab, click the **Split** icon. .

**Can I check out a number of items with different billing information for individual items?**

To use different billing information for different items:

1. In the first step of the checkout, click Edit Lines.

2. In the Billing subtab, edit the information that you want to change for a line. If your organization uses encumbrance accounting, then the GL Date is automatically corrected if it is an invalid date and the application displays an information message about automatic correction. Refer to the *multiple charge accounts* section in this topic for more information on the GL date.

3. In the Accounts subtab, specify or change the account information for a line.

4. Click Return to continue the checkout.

**Can I update multiple lines at once?**

1. In the first step of the checkout, click Edit Lines.

2. Select each line you want to edit.

3. Click Update.

   Only fields that apply to all lines appear.

**Can I allocate item costs to multiple charge accounts?**

The cost of the items is automatically charged to the charge account that your company has set up for you or your organization. Normally, you use this charge account.

To use multiple charge accounts:

1. In the first step of the checkout, click Edit Lines.

2. Click the Accounts subtab.

3. Click the Charge Account to view or change it, or click the Split icon.

   When you select a Charge Account, the GL (General Ledger) date is automatically defaulted to the current system date. You can change this value to a valid date (the date must be within an open purchasing period when the journal entry for this requisition is created). The GL Date is validated during the time the requisition is submitted for approval. A profile option, PO: Validate GL Period controls the validation of this GL Date field. For more information on the profile option, refer to the *Oracle iProcurement Implementation and Administration Guide*. If the value of the GL Date is invalid, for example, the date is in a closed GL period, or in a period that is not yet open, then the application automatically corrects the GL date value to reflect the current system date. The application displays a message on the page informing you that the GL date value has been adjusted automatically. However, you can still change the GL date value to any other valid date, if required.

4. Click Add Another Row to add a charge account. Rate and Amount fields in transaction currency are displayed along with the Amount field in functional currency.

5. Click Return to continue the checkout.

**Can I enter an Accounting Date on an iProcurement requisition?**

You can enter an Accounting Date on an iProcurement requisition, if Dual Budgetary Control is enabled for Purchasing. On the Check Funds page, you can enter the Accounting Date, where the accounting date is initialized. You can use this page to enter or modify the Accounting Date.

iProcurement displays the Check Funds page:

- When you click the Checkfunds button on the Checkout Line page.

- If the accounting date has not been entered or the date present is invalid and you click the Submit button either from the Checkout Summary page or the Checkout Lines page or the Review Submit page.

**Can I bill to a project?**

Yes you can bill to a project if you have an existing project defined in Oracle Projects. You can set up the default project values in your preferences, in which case project details automatically appear for billing. You must select the project number before you can select task number and expenditure information. You can bill to a single project using the first page of the checkout or while editing lines. On the Billing subtab, you can bill multiple projects for a single requisition line by clicking the Split icon.

**What does the Check Funds button do?**

If your organization uses encumbrance accounting and your system administrator has set the profile option for funds checking, you can click Check Funds to determine whether appropriate funds are available for the items that you have ordered. This process does not reserve funds, it verifies to see if funds are available to the charge accounts that you have specified. Funds are reserved when you submit your requisition for approval.

**Do I need to select approvers for my requisition?**

Your company policies determine the approvers for your requisition. You cannot change the default approver list, but you may be able to add approvers or change the first approver, page 9-13.

**Do I need to select viewers for my requisition?**

A Viewer is a person that can be added to the approval list merely for informational purposes only. Your company policies determine the viewers available for your requisition

**What happens if I add approvers or change the first approver?**

You can add approvers or change the first approver if you have been given access to these capabilities.

You can add approvers anywhere within your existing approval list. For example, your existing approval list is Manager A, Manager B, and then Manager C. You add Manager X. The approval now routes through Managers A, B, C, and then X, stopping at X.

If you change the first approver, then that approver's hierarchy is used. For example, your existing approval list is Manager A, Manager B, and then Manager C. You change the first approver to Manager 2. The requisition approval now goes through Manager 2, Manager 3, and then Manager 4 (if Manager 2 has additional approvals). The approval does not go through Managers A, B, and C. If you had changed the first approver to Manager C, then only Manager C's approval would be obtained.

Reset Approval List undoes your changes.

**Can I delete approvers?**

Usually, you can delete only approvers that you added, depending on how your administrator configured the system.

**Can I view the approval route?**

From the Requisitions page, find your requisition and click the Status link.

See also: Finding Requisitions to Approve, page 12-1.

**What happens if I deliver an item to subinventory?**

Selecting the Subinventory while entering delivery information on your requisition indicates that the items you are requesting are for replenishing inventory.

> **Important:** If you enter a subinventory location and select the subinventory check box, the system generates the appropriate account for the inventory item.

**What is an Award?**

An Award represents the source of funding for a project or a task. Multiple awards can fund projects and tasks. An award can fund multiple project and task combinations. Multiple funding of a requisition line can occur automatically if you have set up automatic distribution of Awards in Oracle Grants Accounting.

**Are there additional restrictions on the deliver-to location for internally sourced items?**

At the time an internally sourced item is added to the cart, the sourcing information is determined based on the destination organization. Therefore, changes to the deliver-to location have some restrictions. The system informs you if the new location is not valid.

**Can I change my requisition just before submitting it?**

To modify a requisition during checkout, click the Back button that is on the checkout or submit page.

**Can I change my requisition line numbers?**

To edit a requisition line number, you must set the shopping preference **Manually Update Requisition Line Numbers** to **Yes**. When you set the preference, then you can edit the requisition line numbers on the **Edit and Submit Requisition** page.

**Can I add an attachment when submitting a change request on a requisition?**

You can add attachments to requisition lines when initiating the Change Order process using the Attachments column in the Change Order: Select Lines page. You can add these attachments to the same categories that are available at the time of creating the requisition. Refer to the Checkout topic on information about the categories that are available for attachments.

The permissions to view, update, and delete attachments are the same as those at the time of creating requisitions. Once the change request is accepted, attachments are automatically added to the corresponding Requisition and Purchase Order lines. The Purchase Order Change History does not log information about addition of attachments. Note that adding an attachment is not enough to initiate a change order.

### Related Topics

Creating Contractor Requests, page 10-1

Copying Requisitions, page 11-8

## One-Time Address

**One-Time Address**



**What is a one-time address?**

Specific addresses must be specified for every requisition and requisition line. Generally, these addresses are selected from a defined list of values, but occasionally the requisitioned items must be delivered to a specific one-time address. This one-time address could also be called an impromptu deliver-to location. One-time addresses do not exist in a defined list, but instead are created during the checkout process.

**Is the one-time address available for other requisitions?**

The one-time address defined for a specific requisition appears as a hyperlink next to the Deliver-to Location list of values for other requisitions, provided you associate the address to other requisitions. The one-time address is stored in the database, and is available for use with other requisitions.

**How do I enter a one-time address?**

During checkout, click the link under the Deliver-To Location field for entering a one-time address. This displays the One-Time Address page. The page displays two radio buttons:

- Create New One-Time Address: Click this button to enter Alias or Deliver-To Address and select the Save Address checkbox. Click Apply to save all entered information for One-Time Address creation.

- Search existing One-Time Address: Click this button to enter an Alias or a Deliver-To Location that you wish to use. The system displays a search icon on the same page and you can select a deliver-to location from the search results. Click Apply to use the one-time address from the search results.

For more information on maintaining one-time addresses, please refer to the iProcurement Preferences page content.

## Emergency Requisitions

**Emergency Requisitions**



**What is an Emergency Requisition?**

An emergency requisition reserves a purchase order number at submission. This purchase order number can be provided to the supplier to expedite the process.

**How is an Emergency Requisition different from a standard requisition?**

iProcurement reserves a purchase order number before creation of the purchase order.

**How do I mark a requisition as an "Emergency Requisition"?**

In the shopping cart, select the option **I need a purchase order number immediately**.

> **Note:** The supplier and supplier site must be the same for all lines. (The supplier and site do not always appear in the cart.) For a contractor request, page 10-1, no lines can have a Pending contractor status.

**What is the difference between an Emergency Requisition and a requisition flagged as "urgent"?**

An urgent requisition needs urgent processing, but does not have a purchase order number reserved. You can mark an emergency requisition as "urgent".

## Estimated Taxes

**Estimated Taxes**



**What about taxes?**

Taxes are generated automatically from defined rules established in the Oracle Application setup.

**What is a recovery rate?**

This rate represents the percentage of the tax that is recoverable. The recoverable portion of the tax is not included in the overall approval amount for a given requisition.

**Where can I see the requisition's tax information?**

Tax information appears on most checkout pages in the billing details. It also appears on the Requisitions tab when you select the requisition, click Details for the line, and show all information.

Transaction Currency details are also displayed along with the recoverable and non recoverable tax information.

## Enterprise Asset Management

**EAM - Enterprise Asset Management**



**What is eAM?**

Oracle Enterprise Asset Management (eAM) is an Oracle Applications module that identifies, schedules, and tracks all work activity and costs that relate to assets throughout an organization.

**What is a work order?**

A work order is a listing of maintenance activities that are associated to an asset or a rebuildable item.

**What is an operation reference?**

An operation reference is a task to be performed against a raw material or asset.

**What is a maintenance destination?**

A maintenance destination is the location to which eAM items are normally shipped. eAM items can also be delivered to an Expense location.

## Oracle Process Manufacturing - Outside Processing (OPM-OSP)

**What is Oracle Process Manufacturing - Outside Processing (OPM-OSP) ?**

The integration between Oracle Procurement and Oracle Process Manufacturing enables users to associate goods and services used in Oracle Process Manufacturing to a resource (machinery, raw material, manpower) that is used in a batch which requires outside processing. In process manufacturing industries, a number of operations (or process steps) may not be performed in-house. The operations or steps are sometimes outsourced to a supplier (or another manufacturer or third-party). This outsourcing of operations or process steps is called Outside Processing (OSP). For example, in the food processing industry, the labelling of tins/bottles is done frequently as an outside processing step, while the actual food production is carried out in-house.

In the Requisition pages, the Oracle Process Manufacturing fields are displayed and enabled for use. In order for these fields with updated labels to be displayed in the relevant Requisition pages, the following conditions must be true:

- Line Type should be Outside Processing
- Ship-To Org should be Process Manufacturing enabled
- Destination Type should be Shop Floor

The fields with updated labels are: Job with a new label Batch, Operation Reference with a new label Step Reference.

In addition, the Charge Account is derived by the Account Generator for OPM-OSP distributions for requisitions.

# 10

# Contractor Requests

## Creating Contractor Requests

**When should I use contractor requests?**

Create a contractor request to hire temporary labor, including contractors and temporary personnel.

When you, as a Requesting Manager identify a need for contingent labor, you can create a service requisition for the contractor needed and specify the type of contractor that is required.

As a requesting or hiring manager, you may need to provide additional information such as Skill, Requirement, Competency and location, number of years of experience, Qualification and Language as part of the hiring requirement. The additional information/attributes provided by the hiring manager are accessed by the buyer as well as the supplier. The buyer negotiates with the supplier on the additional information/attributes. The additional information/attributes that are negotiated with the supplier by the buyer are also available in the agreement and in the purchase order document.

**How do I create a contractor request?**

Below the Shop tab, click Contractor Request.

> **Note:** Your company may not have enabled this feature. If not, the system alerts you.

The contractor request flow is:

1. Create the requisition, check out, and wait for approval.
2. For a Pending contractor status, page 10-5, follow these steps. For a Not Applicable contractor status, skip these steps:
   - Oracle iProcurement sends an automated notification to the supplier of the request.
   - You work with the supplier, page 10-6 to choose a contractor.
   - You assign the contractor on your requisition, change amounts if needed, and check out.
   - The system may route the requisition for reapproval.
3. The buying organization at your company creates the purchase order.

Some additional processes in the Contractor Request flow:

If a job is specified in the Create Contractor Request page then the system checks the shopping category associated to the specified job. Additionally, the descriptors that are associated to the shopping category are also displayed in a separate region. Note that the display of the descriptors associated to the shopping category are based on the job selected in Create Contractor Request page.

You as the Hiring or Requesting manager can specify values for the descriptors mapped to the shopping category for the Job. The values specified for the descriptors can be accessed by buyers, who can use the values in those descriptors for negotiating with the supplier.

These processes are also found in the Edit Contractor Request page, where you can update contractor request information.

Special Information page:

- When a contractor request is created and the selected job in the requisition is associated to a shopping cart; if there are descriptors associated to the shopping cart, the system displays the attributes and their corresponding values in the Special Information page. Note that the descriptors that are shown in the Special Information page are based on the job selected in the Create Contractor Request page.

  The hiring or requesting manager can specify values for the descriptors mapped to the shopping category for the Job in the Special Information page. The buyer can use the values in the descriptors for negotiating with the supplier.

- Rate and Amount fields in transaction currency are displayed along with the Amount field in functional currency.

Review Supplier Information page:

If you have selected Standardized Job Rates option in the Create Contractor Request page, the Review Supplier Information page displays the selected list of suppliers in the Supplier Information region.

**How are contractor requests different from other requisitions?**

Contractor requisitions are for hiring temporary labor. Other requisitions are for goods or services, page 7-4. Contractor requests have different fields to enter and an additional step for a Pending contractor status only.

For all requisitions, you check out the request, obtain requisition approval, and track the resulting order, page 11-3.

**Which type should I use?**

Your company may have created its own types, but they are always either of the following temporary labor types:

- **Rate Based**, such as 40 USD per hour

- **Fixed Price**, such as 50,000 USD for the labor

**Which job should I choose?**

Contact your purchasing department if you do not know which job to select.

**What does the category mean?**

The category defaults to a value based on the job that you select. You cannot update or modify the default. It is used on the purchase order to categorize the type of job.

**What is Require Candidate Screening?**

Select this option if an interview or other screening will be required to choose the best contractor for the job. For other kinds of labor, where you rely on the supplier to choose a qualified person, do not select this option.

If you select this option, the contractor status, page 10-5 becomes Pending until a contractor is assigned.

**How do I know which suppliers to choose?**

If your company maintains an approved supplier list, then choose from this list when you create your request. The list may vary depending on factors, such as the job selected and your location. You can use any or all of the preferred suppliers. If you select multiple suppliers, then the contractor status, page 10-5 is Pending until you assign a contractor, page 10-6 from one of the suppliers.

**What happens if I suggest a supplier?**

If you suggest a supplier apart from the preferred suppliers, then you can select from a list of all suppliers defined by your company or manually enter the desired supplier.

When you suggest a supplier, the contractor status, page 10-5 becomes Not Applicable.

**How do I use the standardized job rate options?**

The standardized job rate options enables you to look for suppliers, and display the list of suppliers that match the Job as well as the attribute values provided on the Create Contractor Request page. For example, if you selected Templabor.Analyst with an attribute value such as Senior Systems Analyst (for the Skill attribute), with the standardized job rate options, the system displays all the GBPA's created for both the Job – Skill attribute combination and as well as for the job specified. A tabular region displays the Supplier information, GBPA information, attribute details and Rate information for that Job/Attribute/Supplier. If all the attributes match, those GBPAs are listed at the top of the results in the Supplier Information region. The rest of the matching GBPAs are displayed based on the weightage given to the matching attributes.

The system displays the Rate in transaction currency as well as in functional currency. If the GBPA is created with transaction currency, the system displays the rate in both the GBPA currency and the functional currency.

Note that the system validates and provides information in functional currency.

**What rate and budget information should I enter?**

In the following example, the requester seeks 10 days of labor at a target rate of 50 USD per day:

- **Unit**: Day
- **Estimated Quantity**: 10
- **Target Rate** (USD): 50
- **Labor Amount** (USD): 500 (typically Estimated Quantity * Target Rate, but does not have to be)
- **Expense Amount** (USD): 100 (for example, amount allowed for meals or mileage)
- **Allow Rate Differential**: Check this option to allow overtime pay.

The total amount for this requisition line (always Labor Amount + Expense Amount) is 600 USD.

> **Note:** : For a fixed price type, only the amount fields appear.

The Currency field is displayed in this region when the option Suggest Supplier and Contractor is selected in the Supplier Information region. If you select a currency other than the functional currency, the following fields are displayed:

- Exchange Rate Type
- Exchange Rate Date
- Exchange Rate

In the Supplier Information region, if you select the options Use Preferred Suppliers or Use Standardized Job rates, the fields pertaining to transaction (foreign) currency are not displayed.

If a contract exists between the selected supplier and your company, then the total rate or amount agreed upon appears in the preferred supplier list. If provided, use this information to help you enter the rate or amount for your request.

**Can I mix contractor requests and goods on the same requisition?**

No. The system prompts you to keep these on separate requisitions.

**What does the contractor status mean?**

- **Pending** indicates a full-track request (further negotiation is required). It occurs when more than one preferred supplier is selected, when candidate screening is required, or when the target rate entered on the contractor request does not equal the rate on an existing contract between your company and the supplier.
- **Not Applicable** indicates a fast-track or manual request. It occurs when you suggested a supplier; when a contract between your company and the supplier does not exist; or when a contract exists, and its rate equals the target rate entered

on the contractor request. Not Applicable means that you are letting the purchasing department (or supplier) choose the contractor (although you can suggest a contractor when suggesting a supplier).

- **Assigned** occurs after you assign a Pending contractor.

**What does the contractor requisition status mean?**

A contractor requisition can display the same status as a goods requisition, but is appended with the contractor status. For example, a contractor requisition can be Incomplete, Pending.

**When will the suppliers be notified?**

If the contractor status is Pending, then Oracle iProcurement automatically notifies the selected supplier or suppliers of the contractor request when you check out. Negotiate with the suppliers offline (not through Oracle iProcurement) to find the best supplier for your purposes. Then, assign, page 10-6 this contractor on the requisition to complete the process.

**What if the contractor's start date occurs before the purchase order is created?**

The requisition start date is a guideline. Oracle iProcurement does not require you to complete the purchase order before that date. (Your company may have its own policies, however.)

**Do I have to wait for the purchase order to be approved before the contractor starts?**

Oracle iProcurement does not enforce purchase order approval for the contractor. (Your company may have its own policies, however.)

## Related Topics

Assigning Contractors, page 10-6

Spot Buy Using Contractor Requests, page 10-9

Finding Requisitions to Approve, page 12-1

# Assigning Contractors

**Assigning Contractors**



**Should I always assign a contractor?**

For fast-track contractor requests, the contractor status, page 10-5 on the requisition line is Not Applicable, and you do not have to assign a contractor. For full-track contractor requests, when the contractor status, page 10-5 is Pending, you must follow up with the supplier to choose a contractor. Then, assign, page 10-7 the contractor to your requisition.

**When do I assign a contractor?**

Wait until the requisition status is Pending, Approved.

**How do I assign a contractor?**

1. Access the contractor requisition:
   - On the Contractors tab, view Contractors Pending Assignment.
   - On the Requisitions tab, click the requisition number or description.
   - On the Requisitions tab, select the requisition and click Change.
2. Click Assign Contractor. If you do not see Assign Contractor, then the requisition is not Pending, Approved. (It must be to assign a contractor.) If Assign Contractor is not available, then the requisition has not yet been approved, has been canceled, or has been placed on a purchase order.
3. If the charge for the labor has changed, you can also update the expense or labor amount. This update may require re-approval. Rate, Expense Amount, Labor Amount, Total fields are displayed in transaction currency. In addition, the Total field in functional currency is also displayed.
4. The Assign Contractor page displays those suppliers that have been selected from the option Standardized Job Rates in the Create Contractor Request page (Preferred Supplier region).

**Will the requisition require re-approval after contractor assignment?**

It depends on your company's setup. Your company can set an option that does one of the following:

- Always requires reapproval after a contractor has been assigned.
- Requires reapproval after contractor assignment only if you also changed the expense or labor amount.

**Can I change the contractor assignment?**

Unless the requisition is not eligible for change, page 11-6, you can change the contractor assignment if the contractor status is Pending and the system already has sent the notification to the supplier.

## Finding and Tracking Contractor Requests

**Finding and Tracking Contractor Requests**



**What are active and past contractors?**

Active contractors are those for whom the end date on the contractor request is today, later, or blank. (Contractors who are pending assignment are not considered to be active.) Past contractors are those for whom the end date is before today.

**What is a timecard?**

You may see a timecard icon for active contractors in the Contractors tab or when viewing your requisition line details, page 11-2 on the Requisitions tab. (If Oracle Time & Labor is not installed, then timecard field is not available.) If the contractor has not entered time, then the timecard icon is disabled.

## Evaluating Contractors

**Evaluating Contractors**



**How do I enter performance data?**

Below the Contractors tab, click Performance. If you do not see this area, then you do not have access to performance entry.

**How is the contractor performance data used?**

If you enter performance data for a contractor, then anyone with access to the data can use that information to help select a supplier or assign a contractor. (Your administrator assigns or withholds access to the performance data.)

**Can I enter performance data for contractors not yet hired?**

Neither the contractor nor supplier needs to be entered in the system before you can create a performance entry.

**Can multiple people enter performance data for the same contractor?**

Search for a contractor to see if data have already been entered. You can create your own entry for the contractor, which does not overwrite other entries. For example, Manager 1 and Manager 2 each create an entry for Contractor A. In this example, Contractor A has two performance evaluations in the system that you can view. Optionally, enter your own additional evaluation.

**What happens if I change performance data?**

You can update only performance entries that you created. (People with special security privileges can update others' entries.) Your update replaces the previous information, and the old evaluation is not saved.

**Does the supplier or contractor see my evaluation?**

The performance data are never included on the requisition or in any Oracle iProcurement-automated notification with the supplier. You should, however, assume that your company may share the information any time.

## Spot Buy Using Contractor Requests

Using the Contractors tab, click Create Contractor Request. The following conditions determine the display of Contractor Request columns on the page:

- If the user has a spot buy access role, and if the profile option POR: Use Modernized User Interface for Contractor Request is set to Yes, then the **Category Search** page appears, along with the **Automatically Create a Purchase Order** checkbox.

- If the user has a spot buy access role, and if the profile option POR: Use Modernized User Interface for Contractor Request is set to No, then the **Category Search** page does not appear. However, the **Automatically Create a Purchase Order** checkbox is displayed.

- If the user does not have a spot buy access role, and if the profile option POR: Use Modernized User Interface for Contractor Request is set to Yes, then the **Category Search** page appears. The **Automatically Create a Purchase Order** checkbox does not appear.

- If the user does not have a spot buy access role, and if the profile option POR: Use Modernized User Interface for Contractor Request is set to No, then the **Category Search** page does not appear. The **Automatically Create a Purchase Order** checkbox does not appear.

**To create Spot Buy requisitions for Contractor Requests:**

- The page prompts you to enter the category of job that you require. Enter a job or a keyword for a job in the field next to the question and click **Go**.

The table below the question shows the **Job**, **Category**, **Job Description**, and **Spot Buy Threshold Limit**. Note that the **Spot Buy Threshold Limit** is displayed only when the ICX Spot Buy Access Role is granted to the logged in user. The **Spot Buy Threshold**

**Limit** can also be displayed using page personalization, depending on your business requirements. The buying organization may not wish to display the **Spot Buy Threshold Limit** to spot buy requesters. This is mainly to control the spend limit.

Select a job by clicking the relevant option button.

Below the table is a set of three options that pertain to supplier selection. The question

**Have you identified the supplier?**

requires that you select one of the following options as a response:

- **No, I do not know which supplier to use**: this response opens the Create Contractor Request page with no supplier-related fields. The options for selecting a supplier (Use Preferred Suppliers, Suggest Supplier and Contractor, Use Standardized Job Rates) are displayed, and you can select one of the options to proceed with creating the contractor request. The remainder of the contractor request creation process is the same as the process for creating regular contractor requests. The buyer needs to specify a supplier in Demand Workbench, when the system autocreates the spot buy requisition to a purchase order.

- **Yes, I already have a specific supplier in mind**: this response opens the Create Contractor Request page with the Supplier Information region displayed. The options for selecting a supplier (**Use Preferred Suppliers**, **Suggest Supplier and Contractor**, and **Use Standardized Job Rates**) are displayed. Select one of the options to proceed with creating the contractor request. The remainder of the contractor request creation process is the same as the process for creating normal contractor requests.

- **Yes, I have pricing details from multiple suppliers**: this response displays a table in the **Contractor Request** page, where you can add multiple suppliers (who exist in the system), rank them and enter the prices they have quoted.

When you select **Suggest Supplier and Contractor**, the **Supplier and Contractor** regions appear. Use these regions to search for a supplier and contractor. If you wish to suggest a supplier who does not exist in the system, click the link that reads **If you cannot find your supplier click here to setup a new supplier.** You can then create, invite, or register a new supplier for the spot buy requisition. The link is personalizable, that is, you can hide/show it as per your requirement. The requisition is sent to Demand Workbench, where the system autocreates the requisition to a purchase order.

Note that requesters with a spot buy role can create suppliers when the multiple supplier table is displayed. Requesters without a spot buy role cannot onboard a supplier.

First enter your job information, and then scroll down to the multiple suppliers table. Click the **Add Rows** icon (with the green plus sign) to add a new row for your supplier. Select the supplier name, and enter the price, promised date and rank. The rank for each supplier should be unique (for example: if you have three suppliers, their ranks might be 1,2,3…). If you wish to order from the supplier(s), select the **Order From** checkbox.

Click the **Update** icon to open the **Update Supplier** popup, in order to enter the contact details for the supplier.

If you have a spot buy access role, you can create supplier details in the system. To invite suppliers, you need any requester role, and an Oracle iSupplier Portal licence. To register suppliers, you need any requester role, and access to the **Contractor Request** page.

The **Onboard New Supplier** page displays, where you need to enter supplier details such as **Supplier Name**, **Justification**, **Address**, and **Contact** information. The value of the **Registration Purpose** column is defaulted, depending on the following conditions: In the **Contractor Request** page, if you click the checkbox **Automatically Create a Purchase Order**, the value of **Registration Purpose** is defaulted to Spot Buy Request (non-editable value). However, in the Contractor Request page, if you do not click the checkbox **Automatically Create a Purchase Order**, the value of **Registration Purpose** is defaulted to Contractor Request (non-editable value).

Click the **I agree to the terms and conditions** checkbox in order to proceed with creating, registering, or inviting suppliers. Click **Cancel**, **Invite Supplier**, or **Register Supplier**, depending on your requirement. The new suppliers are registered or invited and their information is updated in the **Contractor** Request page.

In the **Tax Details** region, you can enter tax-related information for the supplier, including Tax Country, Taxpayer ID, Tax Registration Number, and D-U-N-S Number. This region is optional. A buyer can enter the supplier's tax information at a later time. For more information about entering tax information, refer to *Oracle Supplier Lifecycle Management User Guide.*

New suppliers have a supplier status of Approved. Successfully invited or registered suppliers have a supplier status of Supplier to Provide Details. Other supplier statuses for onboarded suppliers are: Pending Approval, Approved, Rejected, and Active (for existing suppliers). When the supplier onboarding is complete, you can proceed with adding to items to your cart and checking out.

Note that the Target Rate may be displayed in the transaction currency, which can be different from the functional currency. However, the **Labor Amount** column shows you the amount value in functional currency only.

The hiring manager can view Supplier Information for the job when the requisition is edited, and can view supplier details along with ranking and shortlisted suppliers for a contractor request in line currency.

When copying a spot buy requisition, the system automatically copies the value of the checkbox Automatically create a Purchase Order when my requisition is approved.

When you create a spot buy requisition with a Smart Form category, the system enables the spot buy requisition as a requisition that can be referenced in purchase orders.

For more information about using Spot Buy Requisitions in the Demand Workbench, please refer to the *Oracle Purchasing User's Guide*.

For more information about setting up Spot Buy, please refer to the *Oracle iProcurement*

*Implementation and Administration Guide.*

# 11

# Requisition and Order Status

## Finding Requisitions

**Finding Requisitions**



**Orders**

**How do I find the status of the latest requisitions I have submitted?**

The most recently created requisitions appear at the bottom of the **Shop** page. You can also view all requisitions in the Requisitions tab.

**What does the Status mean?**

- An **Incomplete** requisition is a saved cart.
- A **Pre-Approved** requisition is approved, but forwarded to another approver.
- **Rejected** has been rejected by your approver.
- **Returned** is where no approver is found, or the buyer has returned the requisition without creating a purchase order.
- An **In-Process** requisition has been submitted but not yet approved.
- **Approved** means the requisition is ready for your purchasing department to convert it to an order and fulfill your request.
- A **Canceled** requisition has been approved for cancellation.
- **Requires Reapproval** means that you or an approver made a change that requires reapproval.
- You may see additional states for contractor requests, page 10-5.

**How do I view details of a submitted requisition?**

1. On the Shop or Requisitions tab, click the requisition number or description.
2. To view additional details, click Details for each requisition line.
3. View supplier statuses, such as Pending Approval, or Active, using the Status field. When the supplier status changes, the Status field also reflects the updates.
4. A contractor request is created and the selected job in the requisition is associated to a shopping category. If there are descriptors associated to the shopping category then the system displays the descriptors their values in the requisition line details page. These descriptors are displayed based on the Job selected in the Create Contractor Request page.

**How do I find all the requisitions I have submitted?**

Use the Requisitions tab. Select All My Requisitions for the View and click Go.

**How do I search for requisitions?**

On the Requisitions tab, click Search. Enter search criteria.

If you search by requester and cannot find the requester, select the option to include employees from all organizations (not just your own).

Search by item number in order to track your requisitions by item. The Item Number column in the search results table enables you to view the requisition(s) with the item number.

Use the Spot Buy Requisitions checkbox to search for spot buy requisitions, along with the search criteria such as Requisition Number, Order Number, Requester, or Status, and so on. The search results table displays spot buy requisitions with a colored icon, to differentiate them from other requisitions.

**Who is included in My Group's Requisitions?**

Requisitions that appear when you choose to view My Group's Requisitions are determined by a document security setup option that your procurement administrator configured.

You cannot see My Group's Requisitions if your administrator has hidden this option.

**How do I view order and shipment status for my requisition?**

On the Requisitions tab, click the number or description of the requisition that you want to view. Click Details for the requisition line to view order, shipment, receipt, invoice, and payment information as it becomes available.

Usually, the purchase order status works the same as the requisition status, page 11-2. Sometimes requisition lines may appear on multiple orders, page 11-4.

**What is the difference between an order and a requisition?**

The requisition is your request for the good or service. An order is a formal authorization to purchase the good or service. Your purchasing department creates a purchase order, which in turn a supplier receives. A sales order is generated orders that you can track until you receive the good or service.

**Can I get updates on the purchase order(s) created from my requisition?**

Select the checkbox **Notify me with status updates for my Purchase Order**. The system then sends you a notification when your purchase order(s) is created or approved.

**How do I use requisition line notes?**

Click a requisition number in the Requisitions tab to open the **Requisition Details** page. You can use the **Notes** page only if your requisition lines have an associated purchase order. Click **View/Manage** in the **Notes** column to open the **Notes** page and add, edit, or delete notes for the specific requisition line.

The requisition line details are displayed in the top region of the **Notes** page. You can add rows in the Notes table for one or more notes. To add a new row, click the **Add New Row** icon (the green plus sign). Select a note type, and enter details for the note such as Description, Planned and Actual Completion Dates, Owner, Status, and Comment. You can add attachments to the note in the same way you would add attachments to a document header or line. . Using the Notes table, you can add new rows for one or more notes.

Click the **Add New Row** icon (with the green plus sign) to add a new row for the note. Select a **Note Type**, and enter the details for the note such as Description, Planned and Actual Completion Dates, Owner, Status, Comment. You can add attachments to the note in the same way you would add attachments to a document header or line.

After you enter the note details, click **Save**. A message confirms that the note has been updated. Click **Return to Previous Page** to return to the **Requisitions Details** page.

**Will I always be able to track the shipment?**

Shipment details appear if the supplier sent an Advance Shipment Notice (ASN) to your company. Some suppliers send an ASN to let the company know that a shipment is coming and to give the shipment details. A Track Shipment icon appears if your company has set up a link to the carrier in the system. A tracking number appears if the supplier included it on the ASN.

**Is the information updated? How often?**

Typically, information is updated immediately. It depends on how frequently your administrator updates the data in the purchasing system.

**What happens if the order associated with my requisition is Canceled or On Hold?**

Canceled may mean that the buyer has decided to place your items on a different order. You may see the order number change soon.

On Hold may also be temporary. Contact your purchasing department for information.

**What does Multiple mean in the Order column?**

In the Order column, Multiple means that different requisition lines have been placed on different orders. For example, all similar requisition lines in the system may be placed on a single purchase order to the supplier. Click the requisition number to display its lines and view the order for each line.

Clicking the Multiple link displays a popup, that shows you the various orders associated to the requisition line. It also displays the order type (Standard Purchase Order, Blanket Purchase Agreement, and so on).

**Why can I view some orders and not others?**

- A purchase order that is in an Incomplete status cannot always be viewed.
- You might not have access to view order details.

**What is a negotiation?**

If your company uses Oracle Sourcing, the buyer may have placed your requisition lines on a negotiation (such as a reverse auction). If the supplier responds to the negotiation and is awarded business by the buyer, then the buyer can create a purchase order.

## Related Topics


Changing and Canceling Requisitions, page 11-5

Copying Requisitions, page 11-8

Returning Requisition Lines from Demand Workbench, page 11-9


# Changing and Canceling Requisitions

**Changing and Canceling Requisitions**



**How do I change a requisition?**

On the Requisitions tab, find and select your requisition, and click Change.

- **Before the requisition is placed on a purchase order**: You can directly change a requisition line if it has not yet been placed on a purchase order. The system withdraws the requisition from the approval or purchase order creation process and places the requisition lines in your shopping cart. You can make changes and start the checkout process, page 9-4. If your organization uses encumbrance accounting and if you change the funded value, then the GL (General Ledger) Date will also be updated. If there is no change in the funded value (reserving or unreserving of funds), then the GL Date that was on the original requisition remains as is. Refer to the *Checkout* topic for more information on the GL Date field validations.

  **Note:** There is no change history, page 11-8 when you change a requisition before placing it on a purchase order (only after).

> **Important:** When you update the requisition details, the application displays a warning message, stating that if you edit the requisition, then the Approval hierarchy refreshes and reverts to the original default approver.

- **After the requisition is placed on a purchase order**: After a requisition line on has been placed on an approved purchase order, you can request changes to specific attributes on the line and the corresponding purchase order. The buyer on the purchase order must accept the change request after which attributes on both requisition and purchase order are updated. Select the line using the unique item code or item line description and click Change.

  If you, as the requester, submit a change request for approval, and the buyer is no longer active, you get a warning message, stating that the buyer is not active. You can opt to either send the notification to the buyer's manager or not to proceed with the change request.

  If you choose to send a message to the buyer's manager, the notification that is sent out informs the buyer's manager that the status of the buyer is inactive. The buyer's manager is then asked to take necessary action on the change request or re-assign to an active buyer.

  When the requisition is approved, the system runs submission checks and identifies PO exceptions (for example, the supplier is not active). In the PO Change Order Acceptance Notification the buyer sees a list of errors and exceptions that he needs to resolve before continuing with the change request. The buyer needs to resolve all exceptions and errors before proceeding. If the buyer clicks Reject, the standard rejection process is performed on the change request.

- **If the requisition is Rejected or Returned** : You can only resubmit, page 11-7 the requisition (by first clicking Change).

- **If the requisition is a contractor request**: The same rules above apply. In addition, you can assign a contractor, page 10-6.

See additional rules for requisitions whose item descriptions are linked, page 9-3

For a contractor request, you can change an approved requisition document and the associated descriptors values during the change requisition process. When you use the Change option, you can modify the values for all the descriptors (mapped to the Job – Purchasing Category – Shopping Category Combination).

**When can I change a requisition?**

Many factors determine whether your requisition is eligible for change. For example, if the requisition line has been placed on a purchase order that has been partially received, then you cannot change the requisition. The system alerts you when you attempt to change a requisition that cannot be altered.

**Can I withdraw a change request for a requisition?**

If a change request is pending (either with an approver or with the buyer), you can withdraw the requisition from the change request process.

Please note that the requisition status should be Approved. Select the requisition, and then click Change. The Withdraw Change Order page displays. Enter a Withdrawal Reason in the text box provided, and click Submit. You get a confirmation message that the change request has been withdrawn.

In the Requisitions page, if you click the Status link for the requisition that has the withdrawn change request, the Change Request Withdrawn action indicates that the change request is now withdrawn.

There is no limit to the number of times you can withdraw a change request.

**Can I use transaction (foreign) currency during a change request?**

You can change the quantity of the line during a change request for a requisition that has a transaction currency. The transaction currency (such as CAD, AUD) displays in the Update page along with the rest of the requisition line details.

This applies to amounts with recoverable and non-recoverable tax. This also applies to requisitions that have catalog items or are non-catlog requests.

**Can I resubmit a rejected requisition?**

You can only resubmit requisitions with a status of Rejected or Returned. After selection, click Change. Your requisition appears in the shopping cart. You can make changes and start the checkout process, page 9-4.

**How do I change an Incomplete requisition?**

On the Requisitions tab, find and select your requisition and click Complete. The checkout process starts, during which you can make changes.

**What is a pending change request?**

A change to an approved requisition that has been included on an approved purchase order that may be delayed while those changes are being approved.

**How do I cancel a requisition?**

On the Requisitions tab, find and select your requisition and click Cancel Requisition.

- **Before the requisition appears on a purchase order**: You can directly cancel a requisition, or any of its lines, before the requisition lines appears on a purchase order.

- **After the requisition appears on a purchase order**: After lines on the requisition appear on an approved purchase order, you can only request cancellations for the lines. The buyer on the purchase order must accept the cancellation request after which the lines on both requisition and purchase order are canceled.

**Can I cancel a line rather than the entire requisition?**

To cancel a line:

1. On the Requisitions tab, find and select your requisition.

2. Click Cancel Requisition.

3. Select the line that you want to cancel and click Continue.

4. Click Submit.

**How do I track my change or cancellation request?**

If you make a change or cancellation before the requisition appears on a purchase order, then the change or cancellation occurs immediately.

If you have requested a change or a cancellation to a requisition after it appears on an approved purchase order, you can track the progress of the request. The requisition is placed in a Pending Change Request state until a buyer has responded to the request.

To track the change or cancellation:

1. On the Requisitions tab, locate or search for the requisition.

2. Select the requisition number or description.

3. Look for the Change History field at the top of the page.

4. If Change History is Yes, click "Yes" to view the history.

**How do I find out why was my requisition rejected or returned?**

1. On the Requisitions tab, click the requisition number or description.

2. Click View Approval History.

3. A reason, if provided, appears in the Notes column.

**Can I change the "I need a purchase order number immediately" check box?**

You cannot deselect this option if the purchase order has already been generated. You can select this option if certain criteria, page 9-15 are met.

## Copying Requisitions

**Copying Requisitions**

How do I copy a requisition?, page 11-9

**Can I copy requisitions in any status?**

You can copy any requisition irrespective of its status.

Some items, however, have a supplier configuration number (which might not appear). For example, personal computers are often configurable, and each configuration has a unique number. These items cannot be copied. The system alerts you that they were not copied.

**Would my copied requisition inherit the approval status of the original requisition?**

No. The copy will be treated as a new requisition and must be taken through the checkout process. When the requisition is submitted a unique requisition number is assigned

**What happens when I copy a requisition?**

You copy the item information from the original requisition into the shopping cart.

The newly copied lines display the currency defined in the source requisition document. Thus if the transaction currency is entered in the original requisition, the transaction currency information along with the functional currency information is copied to the new requisition.

If your shopping cart already contains items, the system gives you a choice of the following:

- Add the copied items to the cart.
- Replace the cart with the copied items (saving the previous cart as an Incomplete requisition).

**How do I copy a requisition?**

In the Requisitions tab, find and select the requisition, then click Copy to Cart.

You can copy a requisition document line for rate based temp labor line type with related descriptors to a new requisition document line in the shopping cart. All descriptors (mapped to the Job – Purchasing Category – Shopping Category association) are copied along with their values to the newly created requisition document line.

## Returning Requisition Lines from Demand Workbench

**Returning All Lines**

This option enables users to return all the requisition lines in Demand Workbench (of Buyer Work Center, Oracle Purchasing). The returned lines go back to the requisitions' demand pool. They are visible in iProcurement. The status of these lines are Returned.

**Returning some (Selected) Lines**

In Demand Workbench (of Buyer Work Center, Oracle Purchasing), if a requisition has multiple lines and the buyer returns a requisition line, only that line is returned instead of the entire requisition. The remaining lines are available to autocreate purchase orders and are available in Demand Workbench. The returned lines go back to Oracle iProcurement.

The returned lines go back to the requisitions' demand pool. They are visible in iProcurement, with the requisition number now suffixed with a '/1'. The status of these lines are Returned.

> **Note:** Please note that the numbering scheme for requisitions should be numeric only, and not alphanumeric. Numeric numbering enables the returned requisitions to be suffixed with a number, not an alphanumeric value.

# 12

# Approving Requisitions

## Finding Requisitions to Approve

**Finding Requisitions to Approve**



**How do I find requisitions that require my approval?**

To find requisitions for approval:

1. Do either:

   - Below the Requisitions tab, click Approvals. You can view requisitions from all operating units for which you have an access. Search for specific requisitions to approve.

- Below the Requisitions tab, click Notifications. View To Do Notifications, page 14-5 and click Go.

2. Find the requisition to approve.

3. Open the requisition or notification.

**What are To Do and FYI notifications on the Notifications page?**

To Do notifications require your approval. FYI (For Your Information) notifications inform you of requisitions that have been approved, approvers that could not be found, or items that you should have received.

**Can I reject some of the items in a multi-item requisition?**

You cannot selectively approve or reject individual items. You can edit the requisition to add or delete items, modify requisition quantity, and then approve the requisition.

**How do I approve a requisition?**

Find and open the requisition or notification, page 12-1 and click Approve. However, the application displays a warning message if you update the details of a requisition. The warning message states that if you edit the requisition details, then the Approval hierarchy refreshes and reverts to the original default approver.

**How do I reject a requisition ?**

Find and open the requisition or notification, and click Reject.

**How do I forward a requisition to another approver?**

1. Find and open the requisition or notification., page 12-1

2. Find and select a forward-to approver.

3. Click Forward to forward to the other approver. Click Approve and Forward to both record your approval and forward the requisition.

See what happens to the approval hierarchy when you add or forward to another approver, page 7-4.

**How do I reassign the requisition to another approver?**

1. Find the requisition or notification., page 12-1

2. Click Reassign. (Depending on how your administrator configured the system, you may see a button other than Reassign. See the online Help on the opened notification for more information.)

**Why do I sometimes not see certain approval actions?**

If you do not see Forward or Approve and Forward actions on any notification, then your system may not have been configured by your administrator to include them.

Alternatively, some notifications vary in the actions that you can take. For example, you may receive notifications to approve incomplete requisitions that you created. In these notifications, you cannot reject the requisition.

You may also see notifications from other applications, which have their own actions.

**How do I know when a purchase order or agreement is created from my requisition?**

If, when you created the purchase requisition, you selected the Notify Me with Status Updates for my Purchase Order checkbox, you will receive notifications when a purchase order or agreement is created from your requisition, and when that purchase order or agreement is approved, or rejected.

When the purchase order or agreement is approved, a notification informs you that the document has been approved, and the supplier will also be notified.

When the purchase order or agreement is rejected, a notification informs you that the purchasing document has been rejected. This notification is sent if you had selected the Notify me with status updates for my Purchase Order checkbox during the requisition creation.

**How do I see the transaction currency in a notification?**

The transaction (foreign) currency information is shown in a notification when you click one of the following links in the notification:

- Edit Requisition
- View Requisition Details

**How do I view charge account details in a notification?**

For requisitions with accounting information, the charge account details are displayed in the notification at the requisition line level. If the requisition has associated projects and tasks, clicking the **Charge Account** link displays the charge account, percent, quantity, amount, project name, task name, and expenditure details. When there are multiple charge accounts, the **Multiple** link displays instead of the charge account (in a web-based notification). Click the **Multiple** link to open the Distributions popup that displays the charge accounts, with the allocation percentage, quantity, and amount. With an email based notification, the **Multiple** link is not available.

### Related Topics

Editing Requisitions in Your Approval Queue, page 12-3

## Editing Requisitions in Your Approval Queue

**Editing Requisitions in Your Approval Queue**

**What changes can I make in the approver shopping cart?**

The approver shopping cart enables you to make changes to requisitions that are waiting for your approval. You can add new items, delete existing items, and change quantities.

**Where do I start to edit a submitted requisition?**

1. On the Requisitions tab, click Notifications.

   The **Notifications** page opens.

2. Click the subject link for the requisition you want to approve, edit, or cancel.

3. Click "Edit Requisition."

   The **Approver Shopping Cart** page opens.

4. Edit the line or click the Trashcan icon on the item line you want to delete.

**Can I delete items from a requisition submitted for my approval?**

Yes. See the steps for editing a submitted requisition, page 12-4.

**Can I update item quantity?**

Yes. See the steps for editing a submitted requisition, page 12-4.

**Can I add items to a requisition submitted for my approval?**

Yes. See the steps for editing a submitted requisition, page 12-4. After you click "Edit Requisition," click "Return to Shopping." Search for your item and add it the cart.

# 13

# Receiving Items

## Finding Items to Receive

**Finding Items to Receive**



**How do I find items to receive?**

Click the Receiving tab to go to the **Receiving** Home page. Look for recently ordered items in the Requisitions to Receive section, click "Receive Items," or use the Search feature that is near the top of the page.

Alternatively, in the Receiving Home page, go to the Requisitions to Receive region and click Full List. The Receive Requisitions page opens.

Note that the full list of requisitions is populated based on the value of the profile option POR: Number of Days for Requisitions Due. If the value of the profile option is set to 20 days, all requisitions that are due to be received in the past 20 days are displayed in the Receive Requisitions page.

Enter or select the relevant search critieria to further filter the list of requisitions. Use the Requisitions Due dropdown list to select the requisitions that are due in a certain timeframe (for example: last 30 days, last 7 days, Today, Next 30 days, Any Time). The due date is calculated based on the Need-By Date.

Use the profile option POR: Default Receipt Quantity to Null, to enable you to enter the received quantity that you require, and not the default value that displays to show the remaining quantity to be received. If you set the value of this profile option to Yes, the

Receipt Quantity will display as 0 or null, and you can update it accordingly. If you set the value of the profile option to No, the remaining quantity to be received is defaulted. The default value of the profile option is No.

**Can I receive the entire requisition?**

On the **Receiving** page, do any of the following:

- Click **Express Receive** icon or **Receive** icon. (One or the other is available.)
- Click **Receive Items** and select all the requisition lines that you want to receive.
- Click **Full List**, and then click **Express Receive** icon or **Receive** icon.

When you click **Receive Items**, the **Receive Items: Select Items** page appears. Use the search criteria to narrow down your search for specific requisitions that you need to receive. You can personalize the search results region by adding or removing columns such as Requisition, Item Number, Description, Need-By, Primary UOM, Primary Quantity, Receipt Quantity/Amount, Unit, and so on.

Enter or select the relevant search criteria to filter the complete list of requisitions. Use the **Item Due** drop-down list to select the requisitions that are due in a timeframe (For example: last 30 days, last 7 days, Today, Next 30 days, Any Time). The due date is calculated based on the Need-By Date.

**What is Express Receive?**

You can see Express Receive only if your administrator allows it. With Express Receive, you receive the items in one step, accepting the order quantity as the receipt quantity.

**How do I expand the search for items to receive?**

On the **Receiving** page click **Receive Items** to open the **Receive Items** page.

The **Receive Items: Select Items** page opens, with the search criteria – **Requester**, **Requisition Number**, **Supplier**, **Order Number**, **Shipment Number**, **Items Due**, and **Items Number**. Click **Go** to search for the requisition to receive. You can personalize the search results region to add or remove columns according to business needs. If you search by the requester and cannot find the requester, then select the option to include employees from all organizations (not just your own).

**Can I receive internally sourced items?**

Yes, it is possible to receive against internally sourced requisition lines (internal sales orders) as long as the receipt routing is set to Direct Delivery. You can search for internally sourced lines by requisition number, shipment number, or order number.

You cannot create a return against an internal sales order receipt, nor can you correct an internal receipt to an inventory destination.

**Can I create receipts against items found on multiple pages?**

Yes, you can select items (lines) across multiple pages and create a single receipt against these items.

**Can I receive Outside Processing (OSP) items?**

The receipt of OSP items can be done only when the status of the OSP Batch step is Released or Completed and the batch is not terminated.

If the status of the OSP Batch Step is Pending, Closed or Cancelled, then Receiving cannot be performed.

## Related Topics

Receipt Notifications, page 13-3

Adding Attachments during Receiving, page 13-4

Receiving Intransit Shipments, page 13-4

Receiving Contractor Requests, page 13-6

# Receipt Notifications

**Receipt Notifications**

How do I find Confirm Receipt notifications?, page 13-3

What actions can I take on notifications requesting receipt confirmation?, page 13-3

**How do I find Confirm Receipt notifications?**

Your PO Confirm Receipt notifications are on the **Notifications** page on the Requisitions tab. Select the notification by clicking the description for the PO Confirm Receipt notification or selecting the notification and clicking Open.

If you have a number of notifications, you can sort them by clicking the Type column heading to help find them. If you have several receipts to confirm, select them and click Open.

**What actions can I take on notifications requesting receipt confirmation?**

- **Receive in Full**: All of the items found on the order have been received.
- **Not Received**: None of the items found on the order has been received.
- **Receive Up to Amount Invoiced**: An invoice was matched in accounts payables. You click this action to create a receipt that equals the invoiced quantity.
- **Partially/Over Received**: A partial or over-receipt is to be created against the order. You must go to the **Receiving** page to initiate this action.
- **Reassign**: Sends the confirm receipt notification to another user to respond to.

## Adding Attachments during Receiving

**Using Attachments in Receiving transactions**



**Can I attach documents to my Receipts, Returns and Corrections?**

You can attach the following document categories to the receipts and returns of items/services, and during correction of created receipts:

- Internal to Receiving: the attachment can be viewed only from the receipts.
- From Supplier: text and non-image file attachments received from the supplier.
- To Payables: attachment information can be viewed by the appropriate Payables personnel. These attachments will be displayed during invoice matching in Accounts Payables.
- To Receiver - the attachment information can be viewed by the receiver, if the receiver is not the requester.
- Miscellaneous

**How do I attach one or more documents to my Receipts, Returns and Corrections?**

Navigate to the relevant Receipts, Returns or Corrections page. The Attachment icon displays in the search results.

Click the Attachment icon to add an attachment and also to view any existing attachments.

The Add Attachment icon in the Attachments column enables you to add attachments to the transaction.

**Can I view the attached documents?**

Use the following pages to view attachments: review and submit pages, confirmation pages, View Receipts page, Receiving home page (My Receipts at a Glance region).

## Receiving Intransit Shipments

**Receiving Intransit Shipments**

**What is an intransit shipment?**

A shipment of items from one inventory organization or supplier to a destination inventory organization. These goods may not yet have arrived at the destination organization. Intransit shipments belong to the following categories:

- ASN shipments that a supplier sent 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 (not supported in iProcurement).

**Is it possible to create a single receipt against both a standard and intransit shipment?**

Yes, you can create a single receipt against both a standard and intransit shipment.

**Can an express receipt be created against an intransit shipment?**

Yes, both standard and express receipts can be created against an intransit shipment in iProcurement.

**Do receiving tolerances apply to intransit shipments?**

The Receipt Date and Over Receipt Quantity tolerances apply to receipts created against ASN's.

For internal orders, these tolerances do not apply. The maximum amount that can be received is the amount found on an internal sales order line. There are no restrictions on the number of days early or days late that a receipt can be created against an internal sales order.

**Can returns and corrections be created against an intransit shipment receipt?**

Yes, you can create returns and corrections for a receipt made against an ASN. You cannot create returns against an internal sales order receipt.

You can make corrections against an internal sales order as long as the destination type is Expense. In this case, the correction quantity must not be greater than the quantity found on the internal sales order line. You cannot make corrections against an internal sales order that has a destination type of Inventory.

## Receiving Contractor Requests

**Receiving Contractor Requests**



**Can I create receipts against all types of contractor requisitions ?**

Contractor requisitions consist of either Rate Based temporary labor lines or Fixed Price temporary labor lines.

Rate Based temporary labor cannot be received. You do not see these lines in receiving. (Typically, Rate Based temporary labor is "received" by the contractor entering a timecard.)

**How do I enter the receipt amount?**

1. On the Receiving tab, click "Receive Items."

2. Search for the requisition to receive.

3. In the Receipt Quantity field, enter the amount (such as 1,000 USD) received.

**Do receiving tolerances apply to contractor requisitions ?**

Over-receipt tolerances apply to Fixed Price temporary labor, but not receipt date tolerances. (Typically, temporary labor is received and paid as the labor is delivered. Therefore, a single receipt date does not apply.)

**Can I create returns and corrections against contractor receipts?**

You cannot create a return for Fixed Price temporary labor nor for some service, page 7-4 requests.

## Returns and Corrections

**Returns and Corrections**



**How do I create returns or corrections to my receipts?**

Click the Receiving tab to navigate to the **Receiving** page, where the links to "Return Items" and "Correct Items" are. You can also create returns and corrections on the

**Receipt Details** page by clicking the "View Receipts" link. See the Finding Items to Receive, page 13-1 page for more details.

When you have found your receipt, enter the quantity that you want to return or correct. Enter details about your return or correction and click Submit to complete the process.

For corrections, enter a reason for the correction in the Reason column. This text field enables you to specify why the correction was made, and any comments you would like to add.

**How do I view receiving history transactions?**

Navigate to the Receiving page and click "View Receipts." You can supply the standard receipt search parameters to limit your search results. Click the raised column headings to sort your list. Click the receipt number. From the **Receipt Details** page, correct or return the items.

The Transaction History page also displays the Comments you entered as a reason during receipt correction.

**What is an adjusted receipt quantity?**

An adjusted receipt quantity symbol next to the Quantity Received amount signifies that the original quantity of this receipt has been modified.

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# Additional Help

## Setting Preferences

**Setting Preferences**



**How do I use iProcurement preferences?**

Click the "Preferences" link at the top of any page to set your preferences. Preferences automatically complete specific information on various checkout pages. Preferences expedite shopping and save time.

To use these preferences, make your selections and click Apply. Some changes may not take effect until your next login.

**What is the difference between iProcurement and general preferences?**

General preferences can apply to other applications that you access, not just Oracle iProcurement. For more information, click the online Help on the general preferences page.

### What are Shopping Preferences?

- **My Favorite Store**: The store you select appears as the default store in the menu next to the Search field on the shopping pages.

- **Search Results Per Page**: Your entry here determines how many requisitions you see on the **Receiving** and **Requisitions** pages.

- **Shopping Search Results Per Page**: Your entry here determines how many items appear for each catalog on the **Search Results** page before you click "Next."

- **Sort Shopping Search Results By** Select a search attribute (descriptor) that you would prefer to see your search results sorted by. In addition, you can select whether your results are sorted by that attribute in Ascending or Descending order.

- **Shopping Search Results Layout**: Select either Grid View or Paragraph view for your search results. Grid view presents the results in a tabular row format like a spreadsheet. Paragraph view presents the results with all the item information grouped together in a style similar to a printed catalog. If you select Paragraph view and you do not want small, thumbnail images of items and of catalogs to appear on the **Search Results** pages, choose to hide them. (You can click "Show Images" on a particular **Search Results** page if you change your mind.)

- **Frequently Ordered Items/Services**: Use this section to enter the details of the frequency of ordered items and services

- **Restrict Frequently Ordered List By**: Enter the value on how you want to restrict the list. For example 1 year.

- **Restrict Number of items in Frequently Ordered List**: Enter the number of items.

- **Manually Update Requisition Line Numbers**: Your entry determines if you can edit the requisition line numbers on the **Edit and Submit Requisition** page. The default preference option is **No**.

### How do I Create Multiple Favorite Lists?

In the Favorites region of the **iProcurement Preferences** page, click Add Another Row. Enter a name for your new favorite list and click Apply. If you want this list to be your default, select it and click Set as Primary.

Your lists are displayed in the Select List drop down. You can move items from one favorite list to another by selecting the item in your search results and clicking Move.

> **Note:** If you search an item in English and add it to favorites, in the favorites list you only find the English instance, even if the item is translated to multiple languages.

**What are Delivery Defaults?**

- **Non-Catalog Request Offset**: Number of days after the non-catalog requisiton date that you want your need-by date to default to. You can change the need-by date during check out.

- **Catalog Offset**: Number of days after the catalog requisition date that you want your need-by date to default to. You can change the need-by date during check out.

- **Punchout Offset**: Number of days after the punchout requisition date that you want your need-by date to default to. You can change the need-by date during check out.

- **Need-By Time**: Default time that you want to use for your need-by date. (For example, you usually need the items by 12:00 on the need-by date. You can change the time during checkout.)

- **Requester**: Name of the person who is placing the order. If you are responsible for placing orders for others in your organization, then you can change the name.

- **Deliver-To Location:** The physical location to which the delivery is made. If you need to regularly ship to a different location, then update the location. Unless the system was configured to disallow it, you can also change this location during checkout.

- **Subinventory:** If your orders are going to be delivered to a subinventory at the deliver-to location, then select the **Deliver to a subinventory** check box and identify the **Subinventory**.

- **Notify me with status updates for my Purchase Order:** If you select the check box, then the requester receives a notification when a purchase order is created or approved. The profile option POR: Notify Requester on Order Creation and Approval determines the default value of this check box in the **Preferences** page. The default value of the **Preferences** page cascades to the requisition pages.

**What are Billing Defaults?**

- **Project Number**: If your organization uses Oracle Projects and your purchases normally belong to a specific project, enter that number here.

- **Task Number**: If your organization uses Oracle Projects and your purchases normally belong to a specific task, enter that number here.

- **Award Number**: If your organization uses Oracle Grants and your purchases normally belong to a specific award, enter that number here.

- **Expenditure Type**: If your organization uses Oracle Grants and your purchases normally belong to a specific expenditure type, enter that number here.

- **Expenditure Org**: If your organization uses Oracle Grants and your purchases normally belong to a specific organization, enter that number here.

- **Expenditure Item Date Offset**: If your organization uses Oracle Grants and your purchases normally belong to a specific item date, enter that number here. This is the number of days after the order date that you want your expenditure item date in the Billing details to default to during checkout.

**What are Favorite Charge Accounts?**

Charge accounts are the General Ledger accounts to which a purchase will be charged. Normally a purchase is charged to the account associated with your employee record. If you commonly order things which should be charged to other accounts, you can set them up in this section and give them an easy-to-remember nickname. You can also select the account that you want to use by default during checkout.

You can choose a Favorite Charge Account to override your default charge account, using the iProcurement Preferences page. If you select the Override Employee Charge Account check box, then the application automatically overrides the Employee Charge Account with the Primary Favorite Charge Account. If the Primary Favorite Charge Account is not specified, then the application will not perform the override.

**What is Notification Management?**

Click the **Notify me with status updates for my Purchase Order** checkbox in order to select whether the requester is notified when a requisition is converted into a purchase order document and / or approved.

You cannot modify the value of the checkbox when the requisition approval is in progress. However this checkbox may be edited when the requisition during draft or edit stages. Additionally, when a purchase order is created from the requisition, or approved, the checkbox can be updated.

The value of the profile option POR: Notify Requestor On Order Creation And Approval determines the value of this checkbox in the **iProcurement Preferences**page. The value of the **Preferences** page cascades to the requisition pages. If the value of the profile option is set to Yes, the checkbox is selected by default. Otherwise the checkbox is not selected by default.

**How do change my password?**

Access the general preferences.

**What is the relationship between Requester and Deliver-to Location?**

The location linked to the requester defaults to the Deliver-to Location field when a new requester is chosen. This is derived from the preferences setting for the requester. Modifying the requester during any of the checkout processes may result in a new Deliver-to Location. If allowed by your administrator's setup of the system, you can modify the Deliver-to Location from either the list of values or manually.

**How do I maintain one-time addresses?**

The Preferences page has a One Time Address region, that displays all the entered one-time addresses. Using this region, you can add, and delete one-time addresses. Simply click on the relevant Add, or Delete buttons after selecting one or more one-time addresses. You can update the one-time address field and the Aliad field.

## Managing Notifications

**Managing Notifications**



**What is the To Do List?**

Below the Requisitions tab, click Notifications. View To Do Notifications. These notifications specify that a document requires your approval, a requisition has been rejected or approved, or you should confirm that a requisition was received.

**How do I reassign my notifications while away from the office?**

Below the Requisitions tab, click Notifications. Click "Vacation Rules." Enter a start date and end date along with the notification recipient.

**What is the difference between Reassign and Vacation Rules?**

Reassign enables you to select one or more notifications to reassign to someone else. (See the online Help on the opened notification for more information.) Vacation rules assign all of your notifications during an extended time frame that you define.

**What are Vacation Rules and Worklist Access?**

Use vacation rules to reassign your notifications temporarily to someone else.

Use the work list access to allow someone else access to your notifications. The system records that person as the actor. Likewise, if someone gives you access to his or her work list, then you can click Switch User to view and act upon that person's notifications.

## Purchasing Policies

Purchasing policies vary by company or by organization within a company. The Purchasing administrator for your organization should replace this page with a page detailing the purchasing policies for your company or organization.

## Contact Purchasing

**Contacting the Purchasing Department**

This is a placeholder. Create a file detailing the procedure for contacting your Purchasing Department and replace this file.

## Contact Technical Support

**Contacting Technical Support**

This is a placeholder. Create a file detailing the procedure for contacting your technical support group and replace this file.

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# Glossary

## iProcurement Glossary

**iProcurement Glossary**

**Approver**

A person with the authority to verify that the contents of the requisition are correct and approve spending.

**Attachment**

Additional descriptive information about your requisition. The attachment may take the form of a file, URL, or text.

**Category**

The term to group items with similar characteristics. Examples of categories include Office Supplies and Electrical Equipment. The categories you see when you request items come from two sources: categories that your Purchasing administrator has set up in Oracle Applications, and categories that external suppliers that your Purchasing administrator authorized have uploaded directly into the online catalog. (When you search for an item, you are searching the online catalog.)

Some categories contain other categories. For example, Office Supplies can contain the **subcategories** Paper and Pens. When you request an item, only the lowest-level category applies. When you request an item from the catalog, the lowest-level category for the item is the default category for you. When you create a non-catalog request, you select a category. The available categories to choose from are always the lowest-level categories.

**Deliver-To Location**

Purchasing administrator can define a default deliver-to location for you in the **My Profile** page. This location applies to all your requisitions, but you can change it on any requisition.

**Exchange Rate**

Exchange rate to use when you select another currency for your requisition. The exchange rate is ignored if you are not using a foreign currency. You can specify an exchange rate only if the Rate Type is User. Otherwise, it is a fixed rate based on the rate type. Anything else that you enter is ignored.

**Exchange Rate Date**

The date upon which the exchange rate applies if you select another currency for your requisition. The exchange rate date is ignored if you are not using a foreign currency. The default is today's date, the date of the requisition, but you can change it. If this is not the correct exchange rate date, change it to the exchange rate date set up in Oracle Purchasing.

**Exchange Rate Type**

The type of exchange rate to use if you select another currency for your requisition. The exchange rate type is ignored if you are not using a foreign currency. Otherwise, it defaults to whatever your Purchasing administrator has set up as the default exchange rate type. Accept the default, or if you know that you need to use a different rate type, select it instead.

**Expenditure Item Date**

The date on which work is performed and is charged to a project and task.

**Expenditure Org**

For timecards and expense reports, the organization to which the incurring employee is assigned unless overridden by organization overrides. For usage, supplier invoices, and purchasing commitments, the incurring organization entered on the expenditure.

**Expenditure Type**

A classification of cost assigned to each expenditure item. Expenditure types are grouped into cost groups (expenditure categories) and revenue groups (revenue categories).

**Internally Sourced Item**

An item which will be sourced from supplies within the organization. Requisitions for these items are sometimes called internal sales orders or internal requisitions.

**Item Description**

A brief description of an item or service.

**Item Type**

An indication of whether you are requesting goods billed by quantity (10 books at 25 USD each), services billed by quantity (10 hours of consulting at 100 USD an hour), or goods or services billed by amount (5,000 USD worth of consulting). You can choose one of these item types on a non-catalog request.

**Need-By Date**

The date by which you need the item.

**Note**

Additional information or special instructions about the requisition that you want to bring to the attention of the approver or buyer.

**Organization**

A business unit such as a plant, warehouse, division, or department.

**Pre-Approved**

A requisition that has been approved, but then forwarded to another approver for additional approval.

**Procurement Card (P-Card)**

A corporate credit card issued to an employee to purchase items directly from a supplier. P-Card requisitions are approved and transmitted to the supplier like any other purchase order.

**PO Number**

The unique number assigned to the purchase order that the buyer sends to the supplier to fulfill your requisition.

**Project Number**

The unique number assigned to a work project. You can select a project number to charge to when you enter billing information on your requisition.

**Receipt Quantity**

The quantity of items received from a supplier. The supplier may ship the total quantity you requested in several shipments. In such cases, the receipt quantity will not equal the total quantity you requested.

**Shopping Cart**

A container for all the items you have selected in the current session. You can save a shopping cart and return to it later. After you add item(s) to your cart, click Save Cart. You can access this cart later by clicking the "Open Saved Cart" link.

**Subinventory**

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock. The subinventories you select from when you enter delivery information are defined in Oracle Applications.

**Supplier Item Number**

The number that the supplier uses to identify the item or service.

**Supplier Name**

The supplier company name. These supplier names are defined in Oracle Applications.

**Task Number**

Number assigned to a specific task within a project. Each project can have a hierarchy of tasks within it. You can charge costs to tasks at the lowest level only. (When you select a Task by clicking Select next to the Task field, the tasks that appear are only the lowest-level tasks.)

**Unit of Measure**

The unit of measure (UOM), such as Each, in which the quantity of an item is expressed. Purchasing recognizes the United Nations (UN) standardized UOM codes, which are offered in the list of Units when you click Select next to the Unit field in a non-catalog request. (When you search for an item and select it, a Unit is already associated with it, and you can't change it.)

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