



2024

# Procurement Admin Guide



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V1

Camptra Technologies

1/1/2024

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# Guide Usage and Disclosures

## Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training team at [learn@camptratech.com](mailto:learn@camptratech.com).

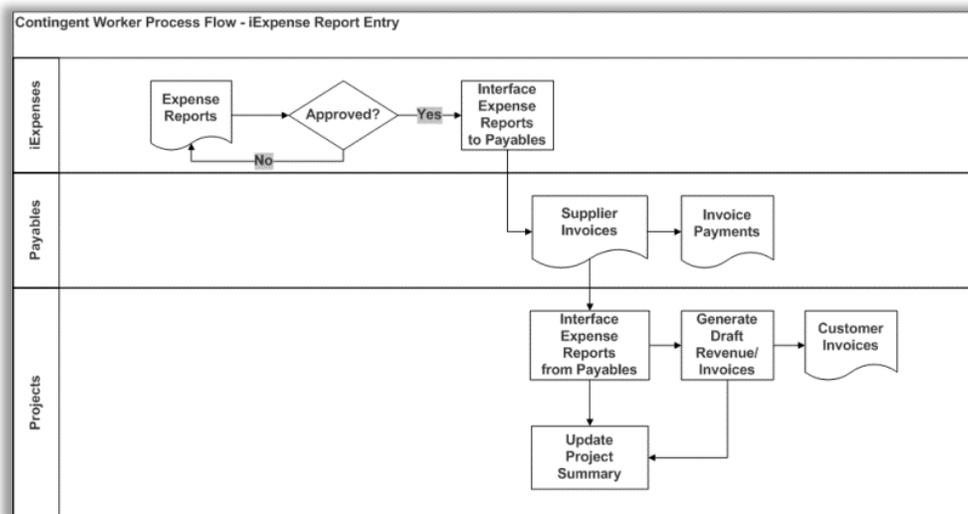
## How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

- ❖ Any fields with an asterisk are required fields.
- ❖ Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
- ❖ You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

## Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Procurement module.



## Glossary of Terms

Here we've included common terms associated to the Procurement module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

### Purchase Requisition

- ❖ An internal request for goods or services. A requisition can originate from an employee or from another process, such as inventory or manufacturing. Each requisition can include many lines, generally with a distinct item on each requisition line. Each requisition line includes at least a description of the item, the unit of measure, the quantity needed, the price per item, and the Accounting Flexfield you are charging for the item.

### Receipt

- ❖ A shipment from one supplier that can include many items ordered on many purchase orders.

### Supplier

- ❖ Provider of goods or services.

### Supplier Product Number

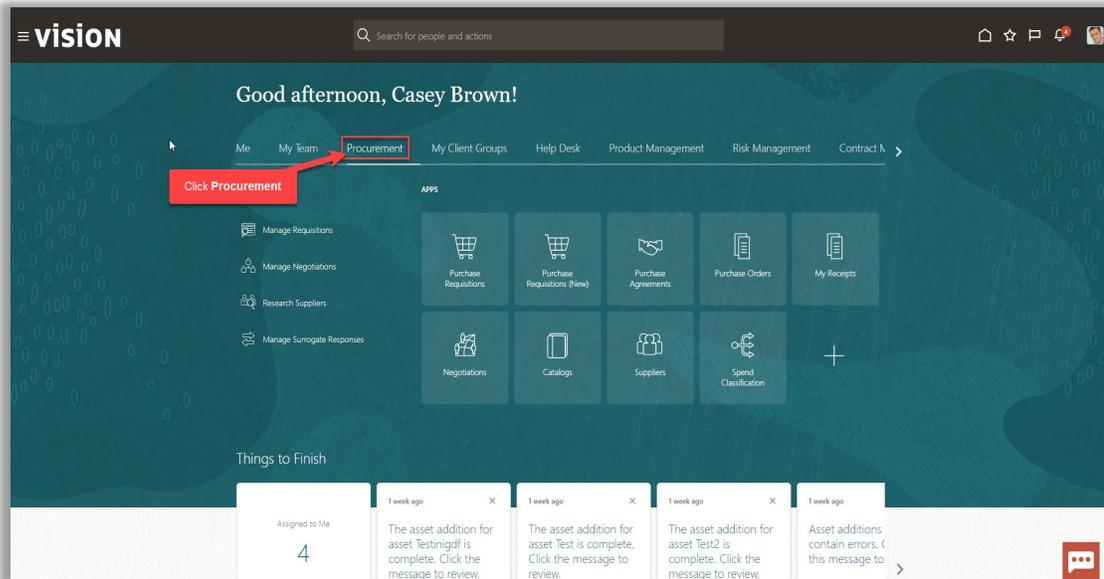
- ❖ The number your supplier assigns to an item. You and your supplier can have different item naming conventions. You can identify the item with one number (Item) while your supplier identifies this item using another number (Supplier Product Number). Using and referencing supplier product numbers helps you speed up your purchasing cycle. By referencing a number your supplier knows, you can help your suppliers understand your purchase orders and RFQs better.

# Day to Day Operations Guide

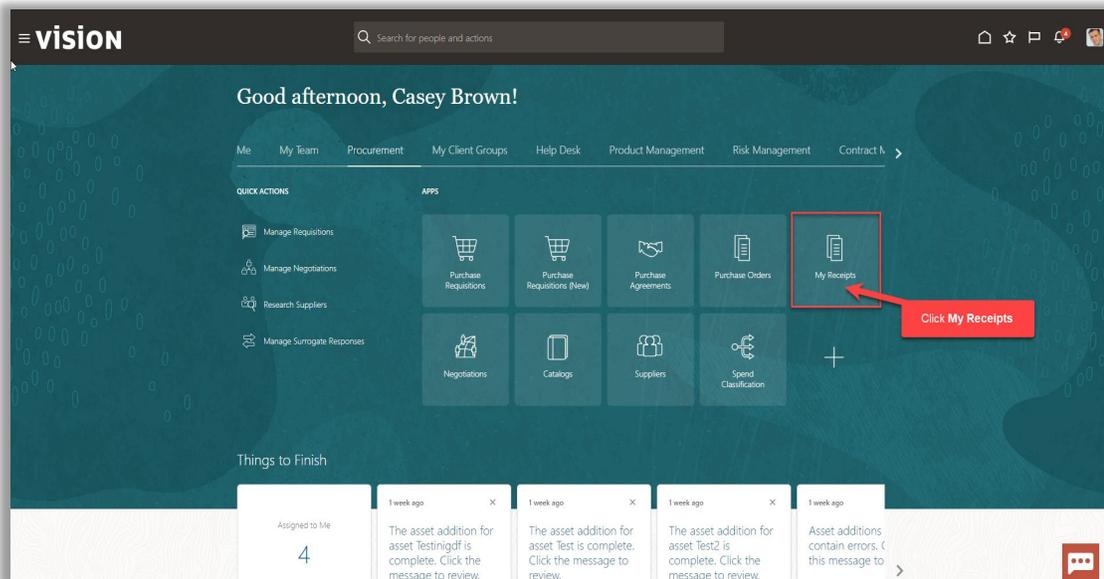
## Create Receipt For Received Items

Navigation: Home>Procurement>My Receipts>Search>Click Receive>Enter Quantity>Submit

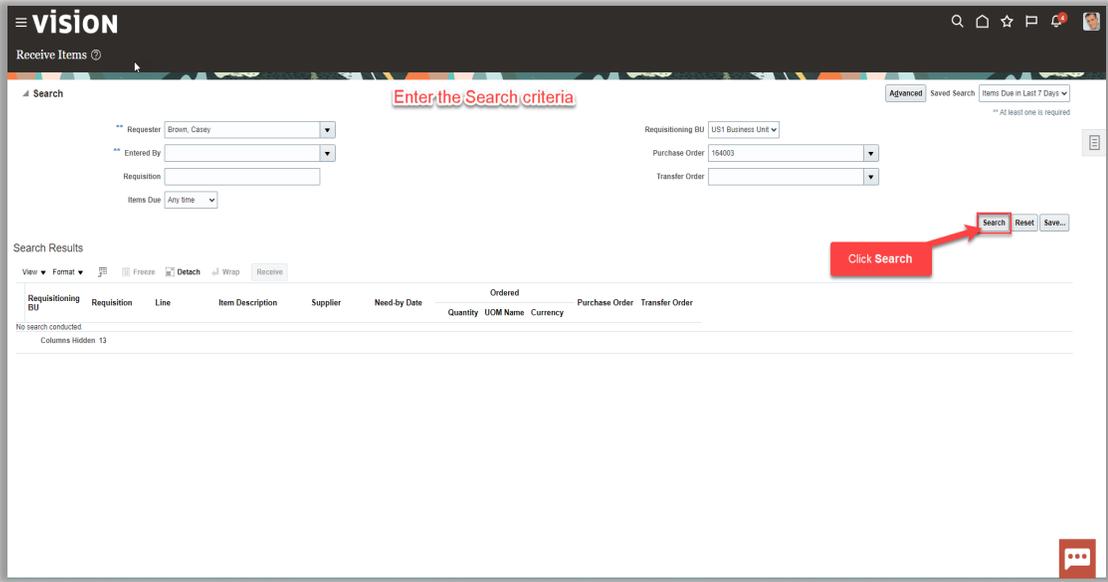
From home screen, click **Procurement**



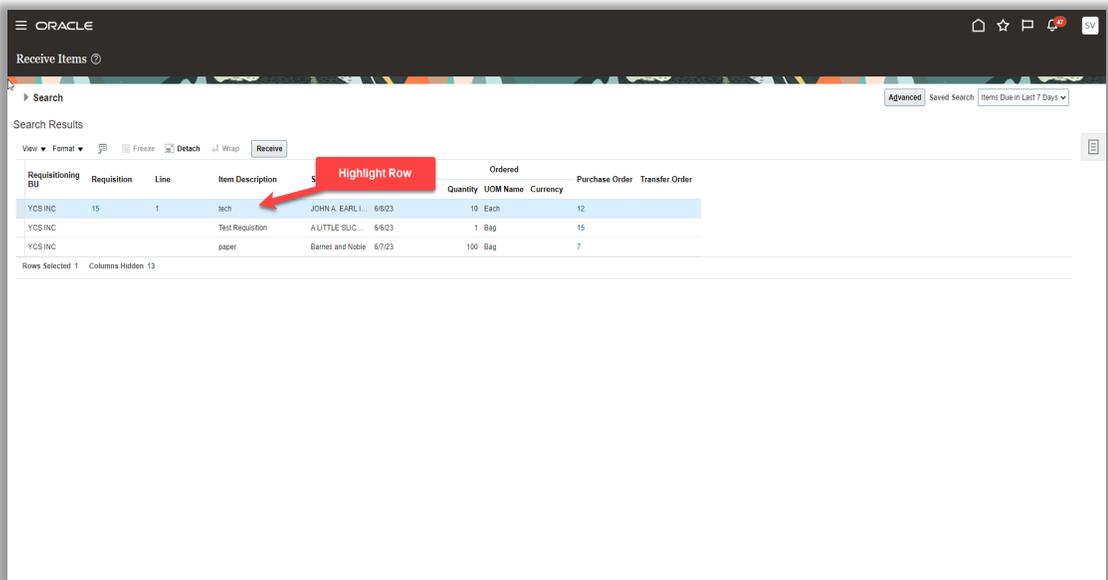
Next, click **My Receipts**



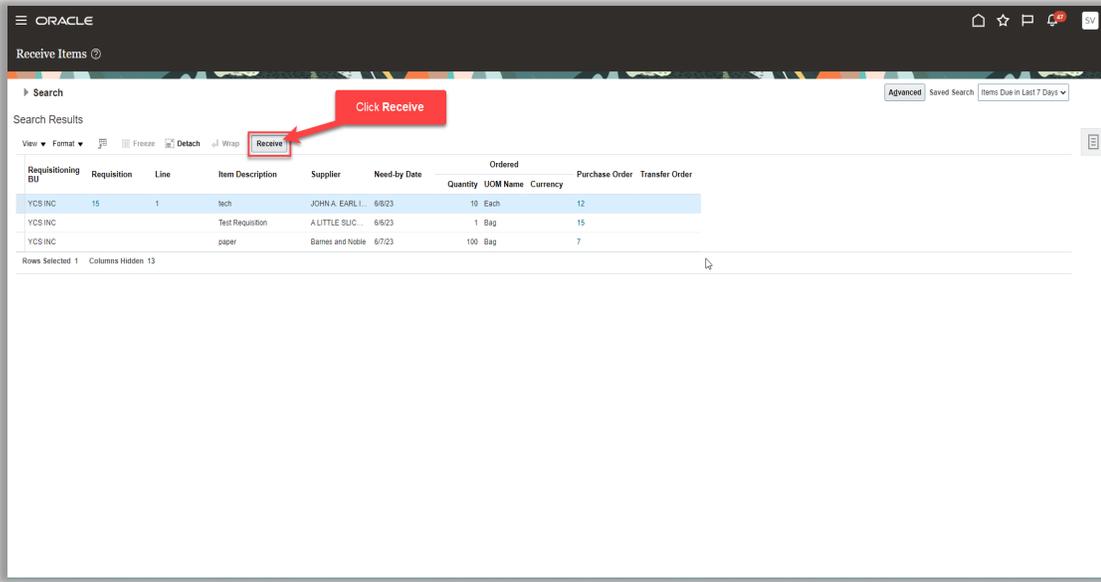
Enter the **Search** criteria and click **Search**



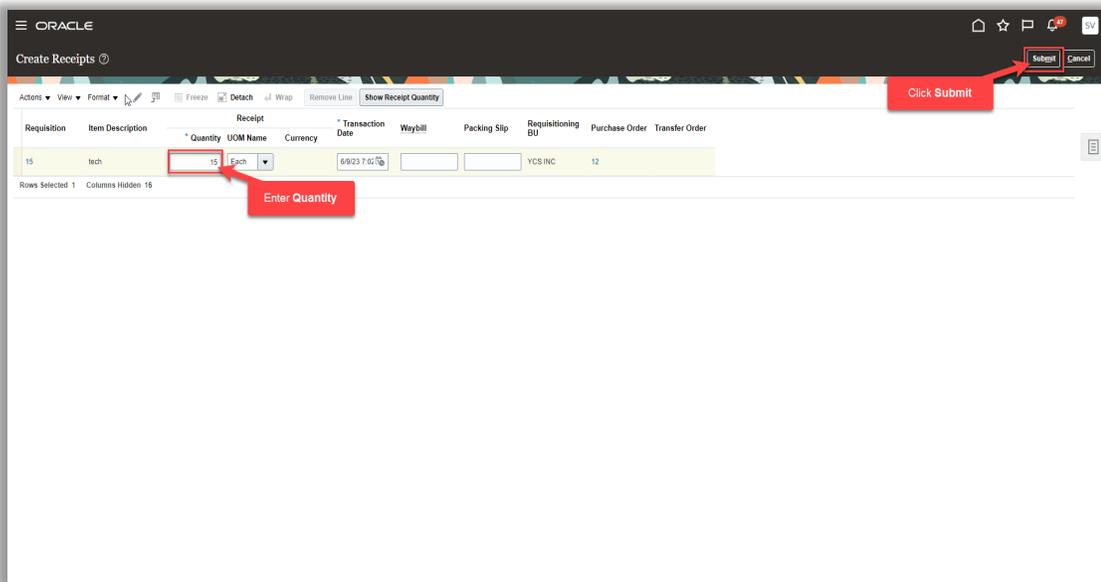
Highlight the row



Click Receive



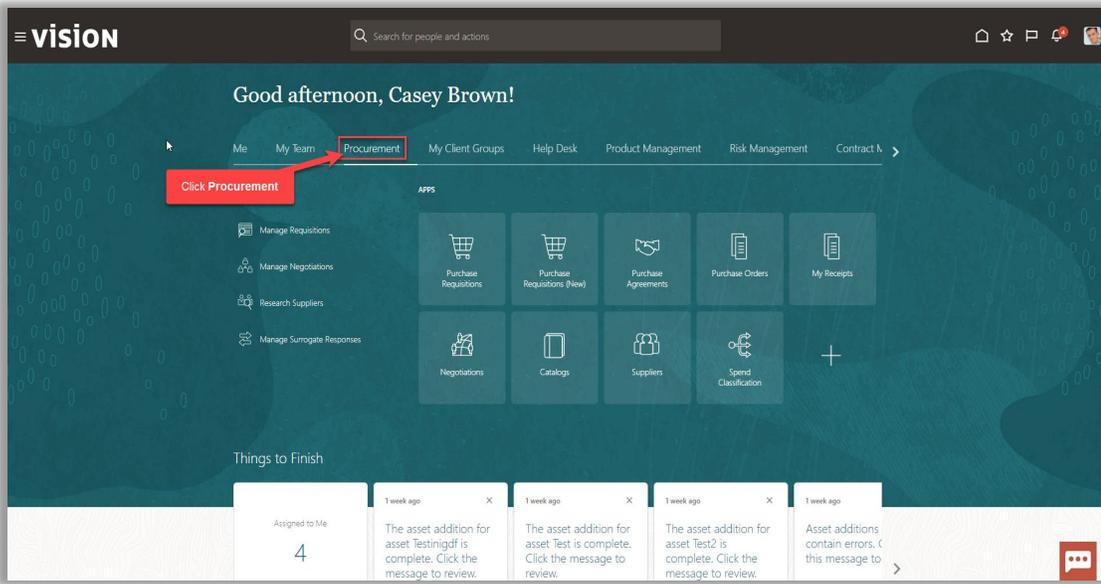
Enter **Quantity** and verify additional information and click **Submit**



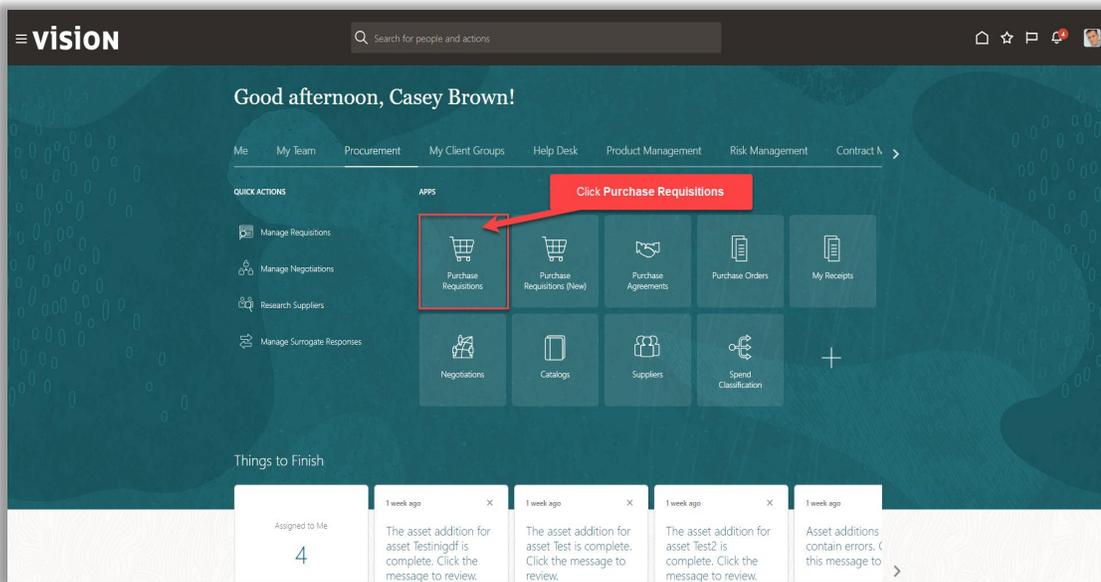
### Create Non-Catalog Requisition

Navigation: Home>Procurement>Purchase Requisitions>Edit>Save and Close>More Tasks>Create Non Catalog Request>Input Details>Add to Cart>Review>Review Billing Information>Check Funds>Submit>Bell Icon>Select Requisition>Approve>PO Created

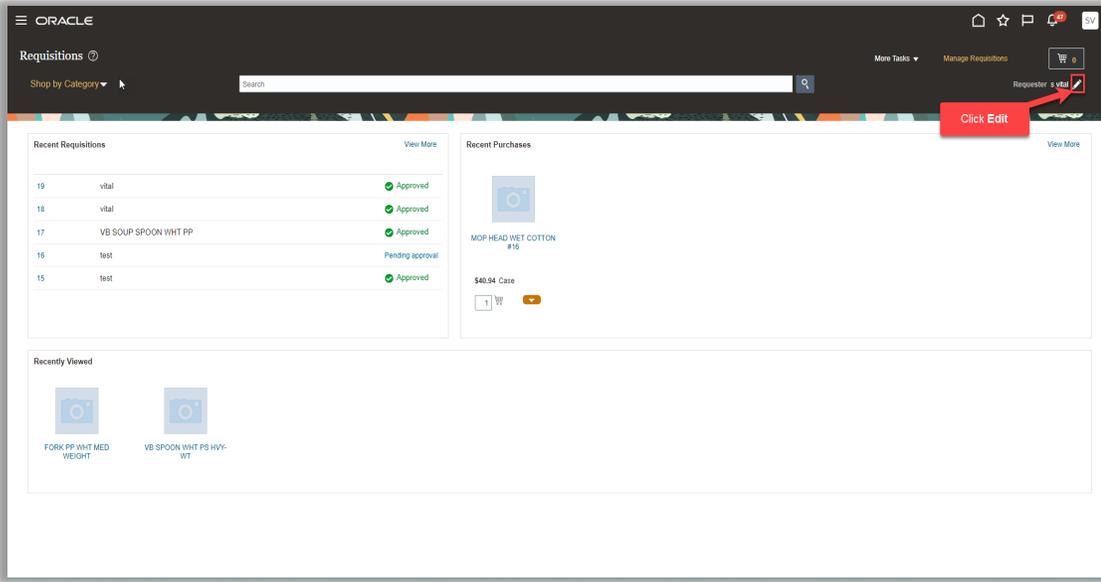
From home screen, click **Procurement**



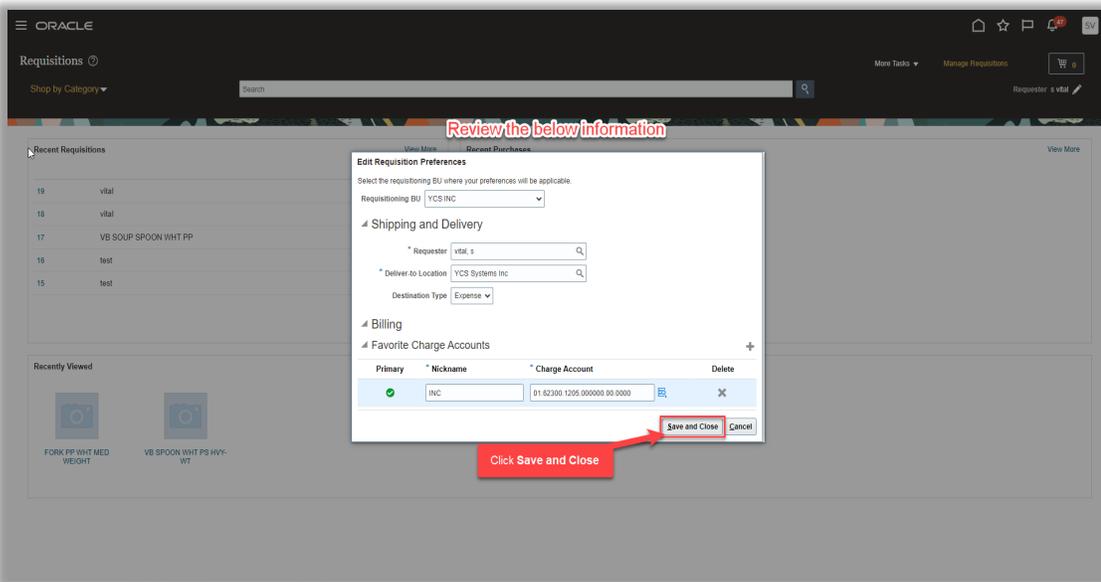
Next, click **Purchase Requisitions**



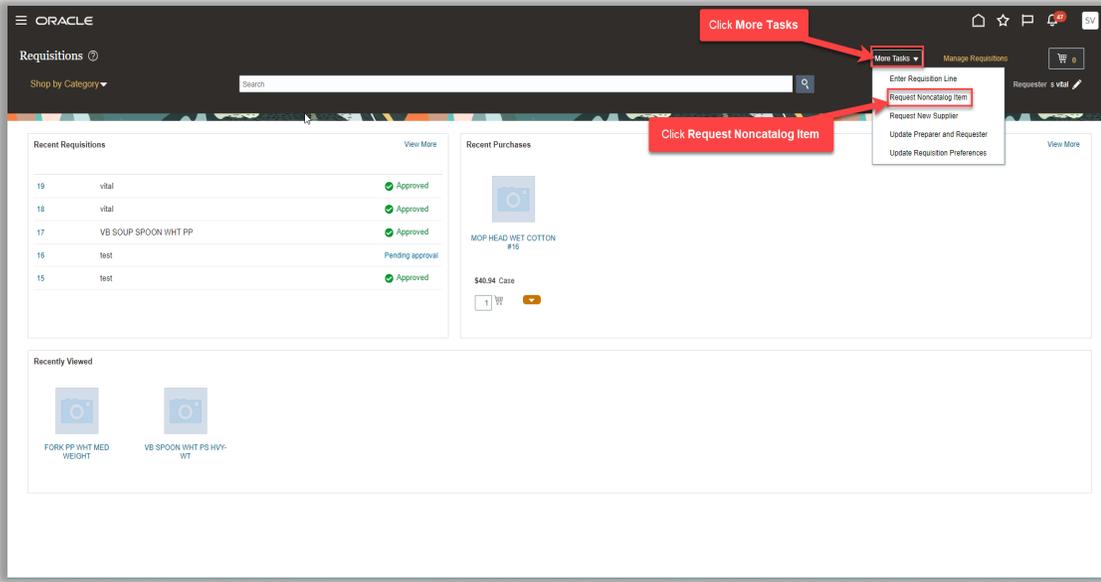
Click **Edit** next to **Requestor**



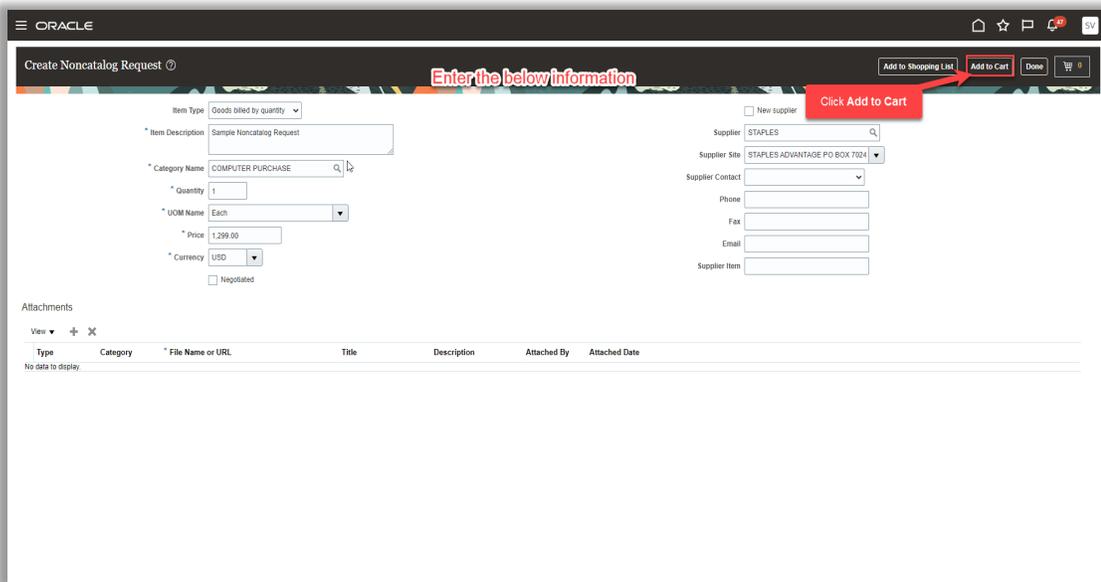
Update or review the information and click **Save and Close**



Next, select **More Tasks** then **Request Noncatalog Item**



Enter the information and click **Add to Cart**



Click the **Cart** icon

ORACLE

Create Noncatalog Request

Add to Shopping List Add to Cart Done Review

Click Cart

Item Type: Goods billed by quantity

\* Item Description

\* Category Name

\* Quantity: 1

\* UOM Name

\* Price

\* Currency: USD

Negotiated

New supplier

Supplier

Supplier Site

Supplier Contact

Phone

Fax

Email

Supplier Item

Attachments

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.						

Click Review

ORACLE

Create Noncatalog Request

Add to Shopping List Add to Cart Done Review

Click Review

Item Type: Goods billed by quantity

\* Item Description

\* Category Name

\* Quantity: 1

\* UOM Name

\* Price

\* Currency: USD

Negotiated

New supplier

Supplier

Supplier Site

Supplier Contact

Phone

Fax

Email

Supplier Item

Attachments

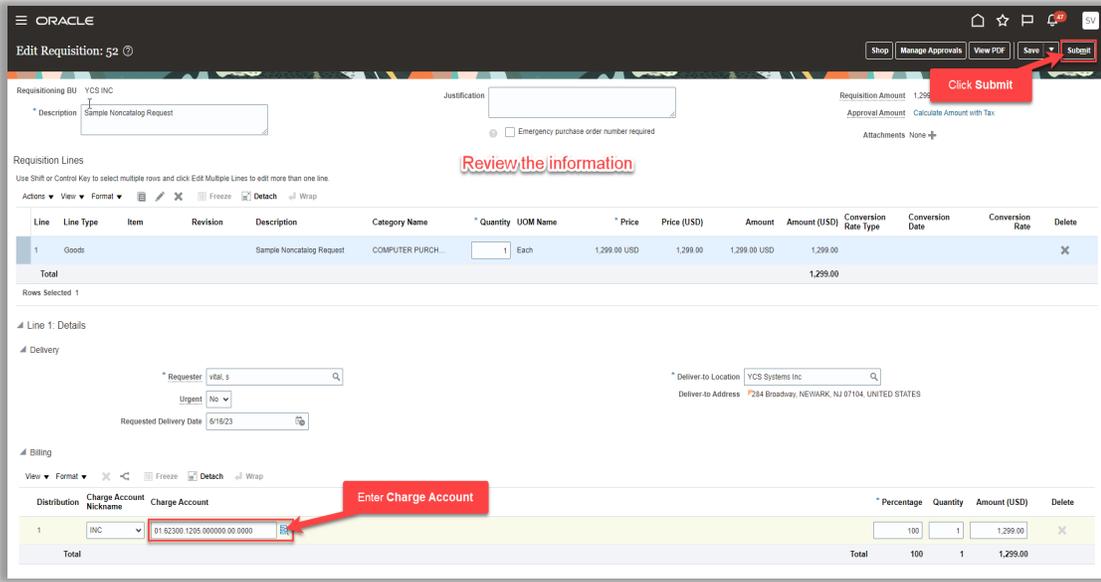
Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.						

Sample Noncatalog Request \$1,299.00 Each

Total \$1,299.00

Review Submit

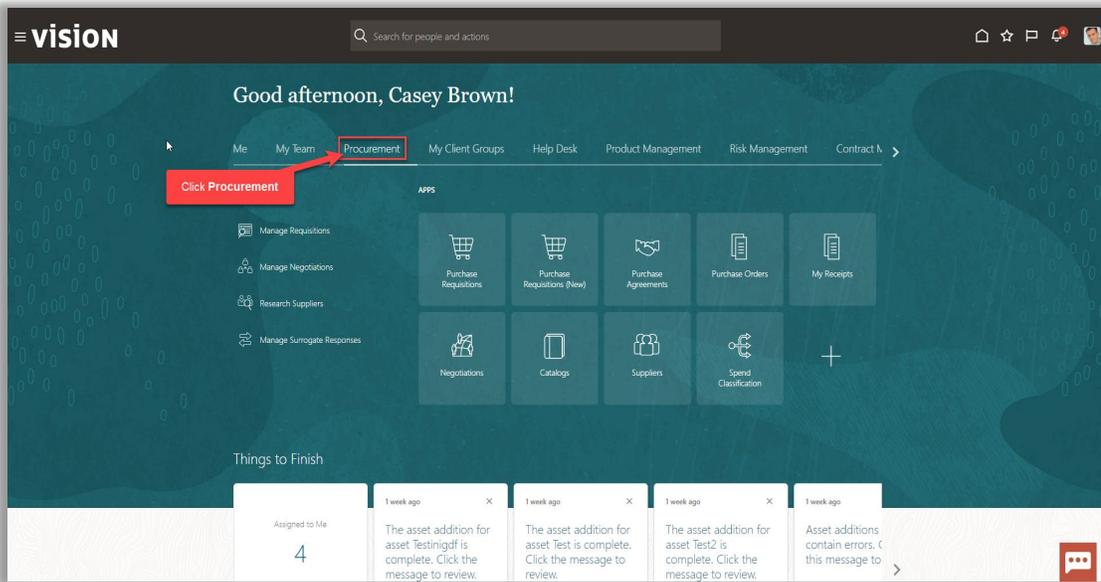
Review the information. Click  and enter the **Charge Account**. Click **Submit**



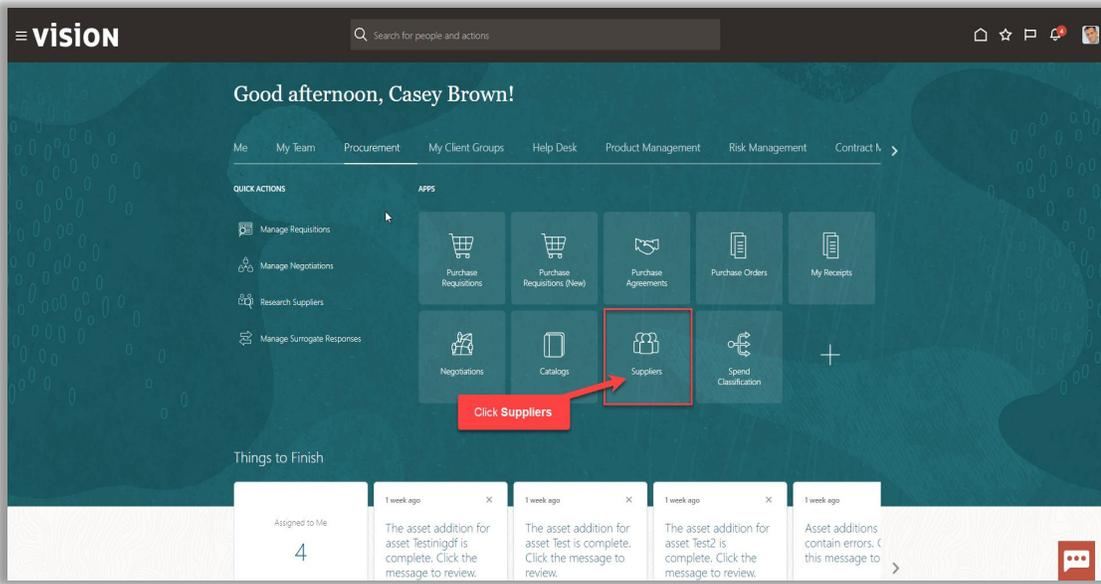
## Create Supplier

Navigation: Home>Procurement>Suppliers>Create Supplier>Enter Details>Save>Click Addresses Tab>Create>Enter Details>Save>Click Sites Tab>Create>Enter Details>Save>Click Sites Assignments Tab>Create>Enter Details>Save

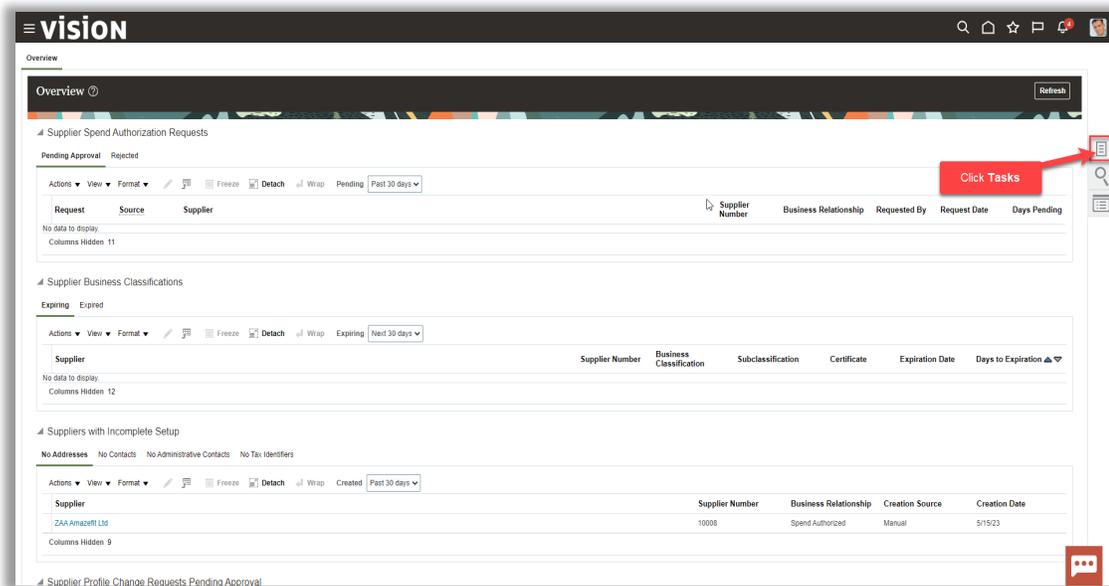
From home screen, click **Procurement**



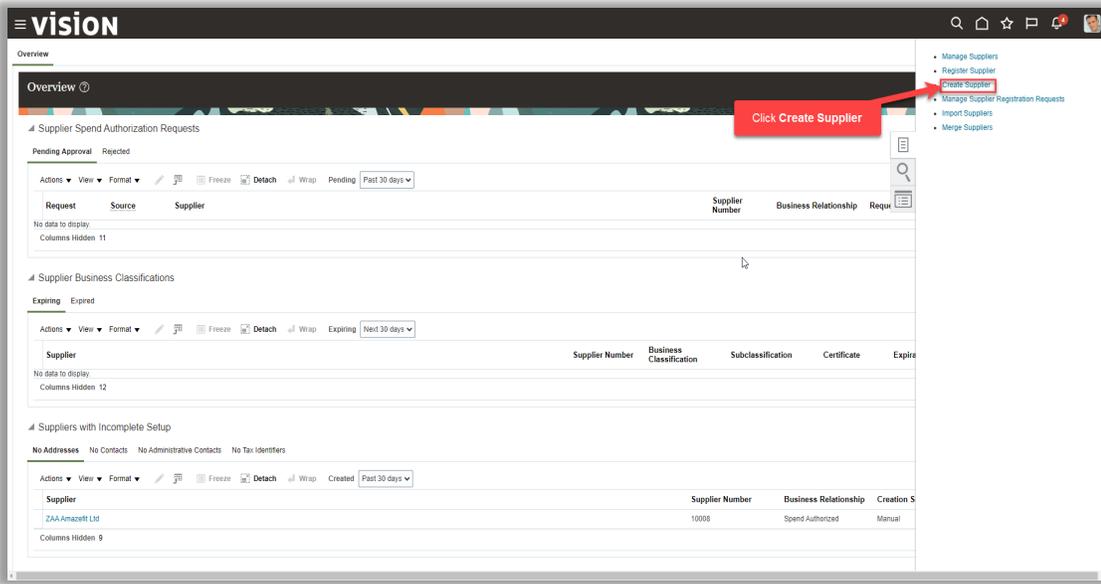
Next, click **Suppliers**



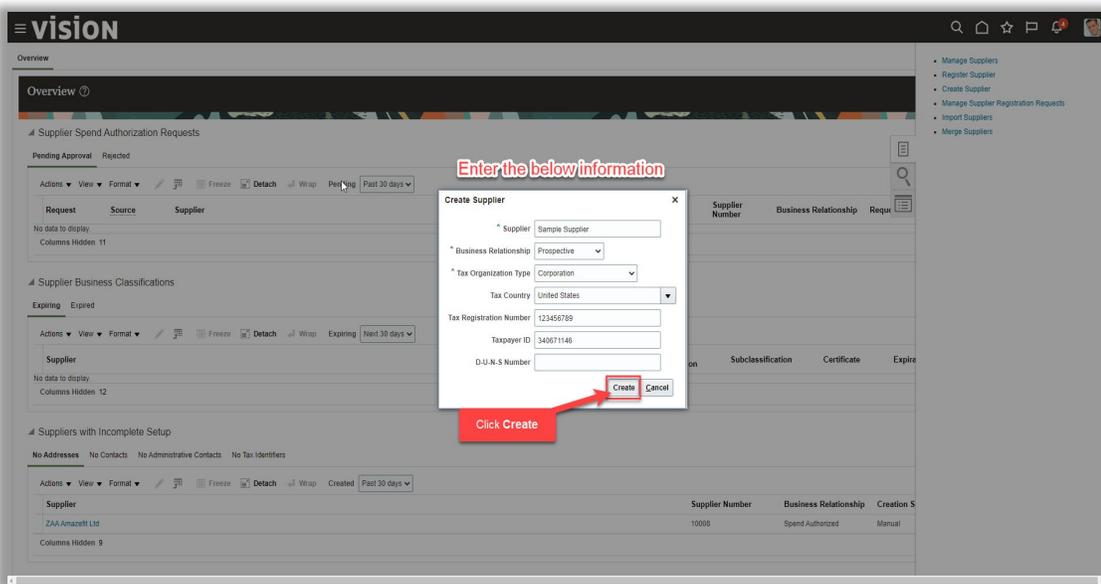
## Click Tasks



## Click Create Supplier



Enter the **Create Supplier** Details and click **Create**



Enter the details in the **Profile** tab

**vision**

Overview Supplier: Sample Supplier x

Edit Supplier: Sample Supplier ☆ Save Submit Cancel

Profile Addresses Contacts Qualifications

General

Supplier Sample Supplier

Supplier Number 10011

Alternate Name

Tax Organization Type Corporation

Supplier Type Supplier

Inactive Date m/d/yy

Status Active

Business Relationship Prospective

Parent Supplier

Parent Supplier Number

Creation Date 6/7/23

Creation Source Manual

Attachments None

Additional Information

Office Recycling Percentage

Debt Rating

Profile Details

Organization Business Classifications Products and Services Transaction Tax Income Tax Payments

Identification

Alias

D-U-N-S Number

One-time supplier

Customer Number

SIC

Industry Category

Industry Subcategory

National Insurance Number

Corporate Web Site

Next, click the **Addresses** tab

**vision**

Overview Supplier: Sample Supplier x

Edit Supplier: Sample Supplier ☆ Save Submit Cancel

Profile **Addresses** Contacts Qualifications

General

Supplier Sample Supplier

Supplier Number 10011

Alternate Name

Tax Organization Type Corporation

Supplier Type Supplier

Inactive Date m/d/yy

Status Active

Business Relationship Prospective

Parent Supplier

Parent Supplier Number

Creation Date 6/7/23

Creation Source Manual

Attachments None

Additional Information

Office Recycling Percentage

Debt Rating

Profile Details

Organization Business Classifications Products and Services Transaction Tax Income Tax Payments

Identification

Alias

D-U-N-S Number

One-time supplier

Customer Number

SIC

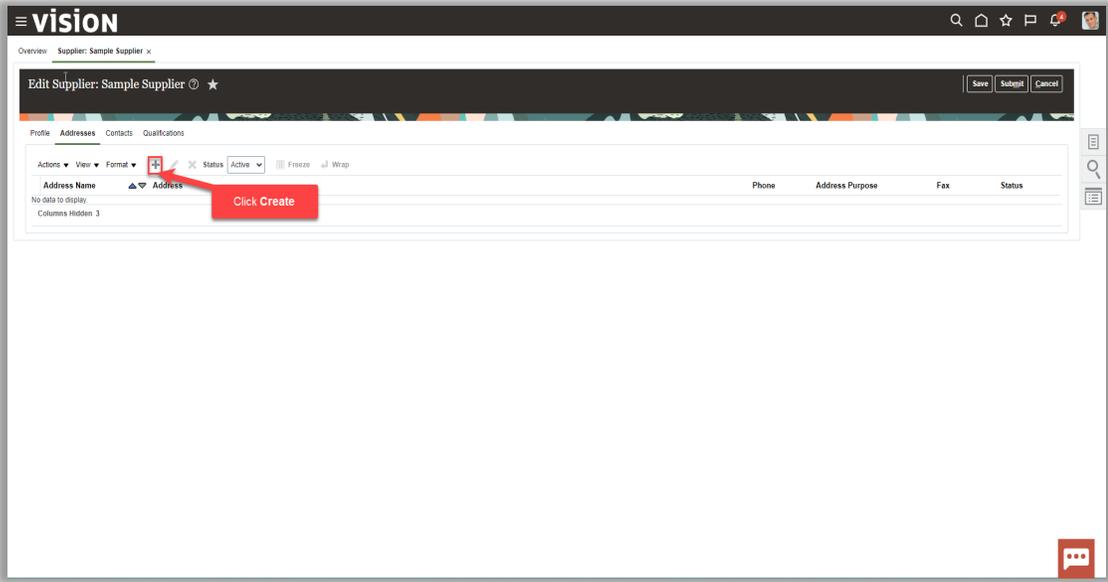
Industry Category

Industry Subcategory

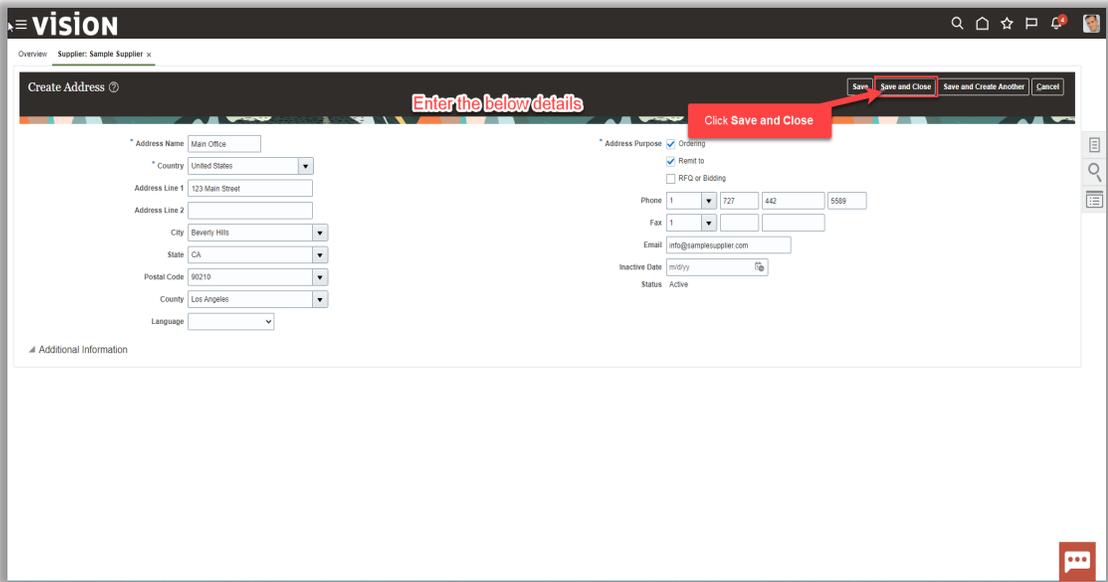
National Insurance Number

Corporate Web Site

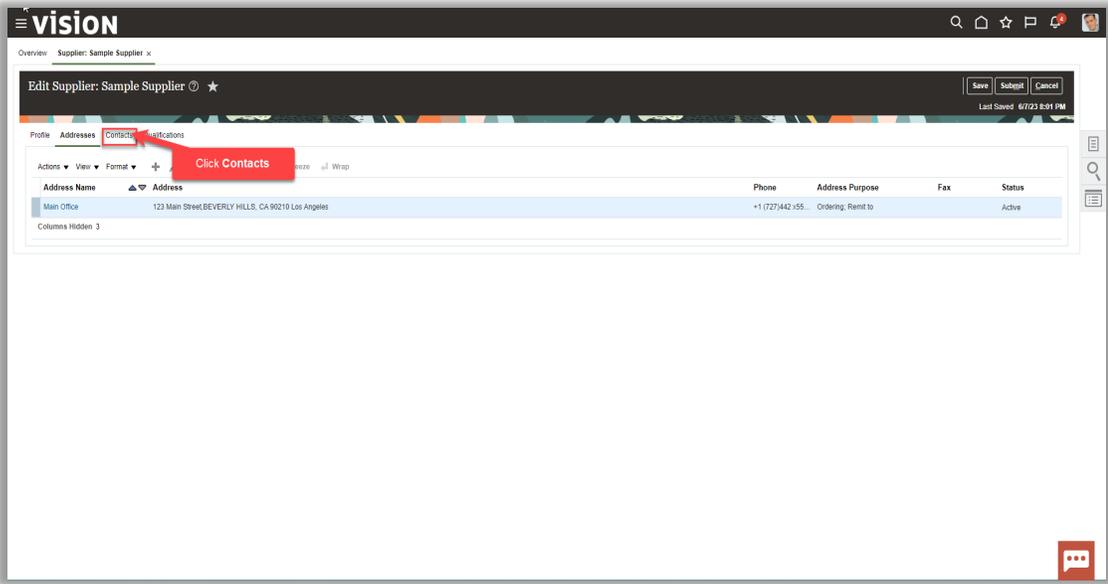
Enter the details in the **Addresses** tab. Click **Create**



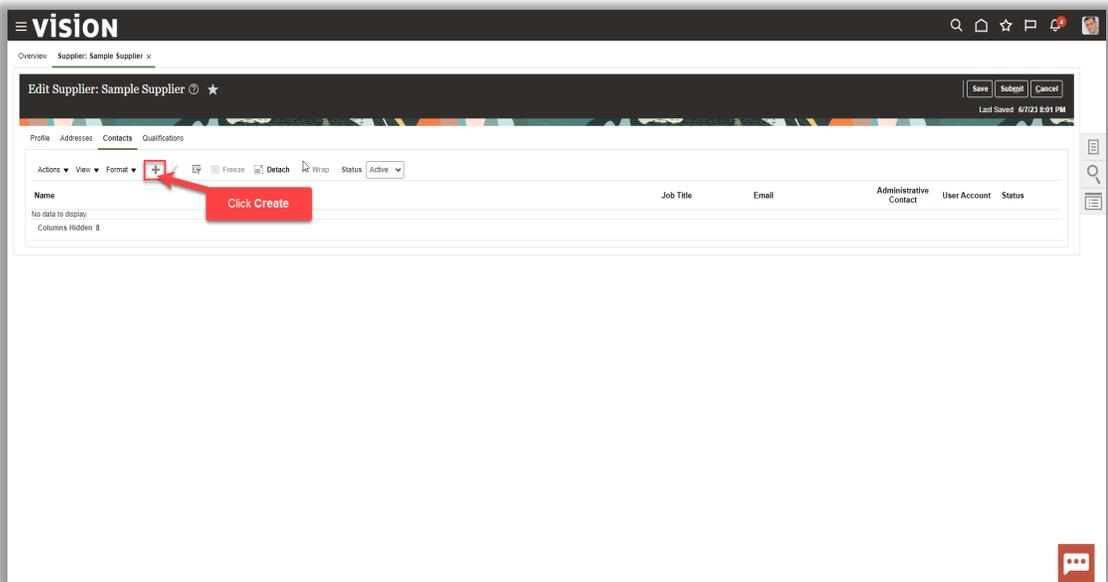
Enter the **Create Address Information** and click **Save and Close**



Next, click the **Contacts** tab



## Click Create



Enter the details in the **Contacts** tab and click **Save and Close**

Oracle Supplier: Sample Supplier x

**Create Contact** Enter the below details Save and Close Save and Create Another Cancel

Salutation: Mr.

\* First Name:

Middle Name:

\* Last Name:

Job Title:

Administrative contact

Phone:

Mobile:

Fax:

Email:

Status: Active

Additional Information

Contact Addresses

Address Name	Address	Phone	Address Purpose	Status
No data to display. Columns Hidden: 4				

User Account  Create user account

Roles: Data Access

Role	Description
No data to display.	

Lastly, click the **Qualifications** tab

Oracle Supplier: Sample Supplier x

**Edit Supplier: Sample Supplier** Click Qualifications Promote to Spend Authorized Save Save and Close Cancel

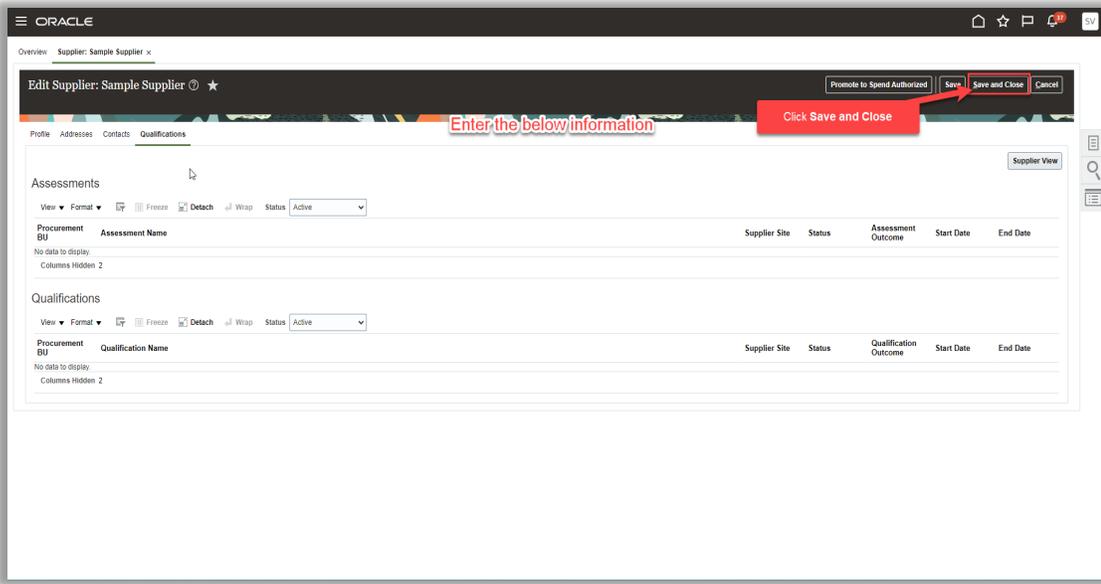
Profile | Addresses | Contacts | **Qualifications**

Actions: View | Format | Freeze | Detach | Wrap | Status: Active

Name	Job Title	Email	Administrative Contact	User Account	Status
Buckle, Megan			<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active

Columns Hidden: 0

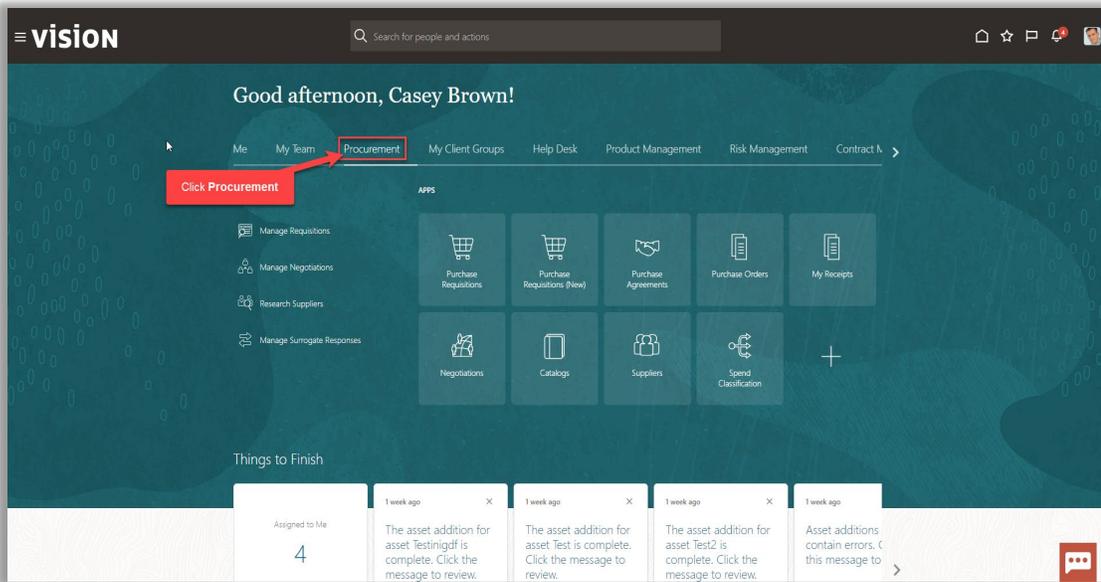
Enter the below information, if applicable. Click **Save and Close**



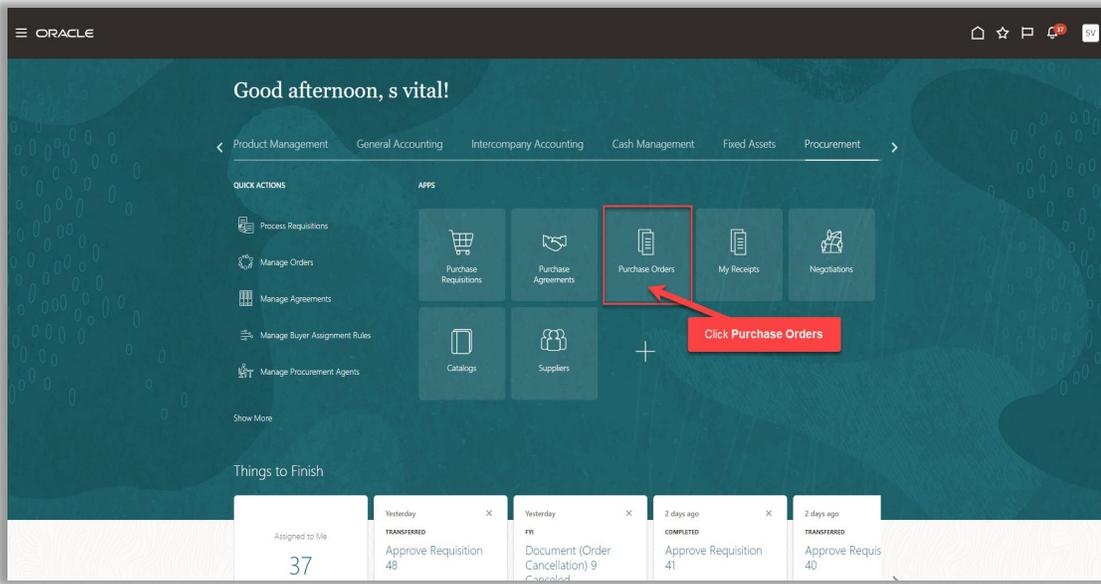
## Create Purchase Order

Navigation: Home>Procurement>Purchase Orders>Tasks>Create Order>Enter Details>Create>Enter Information>Submit

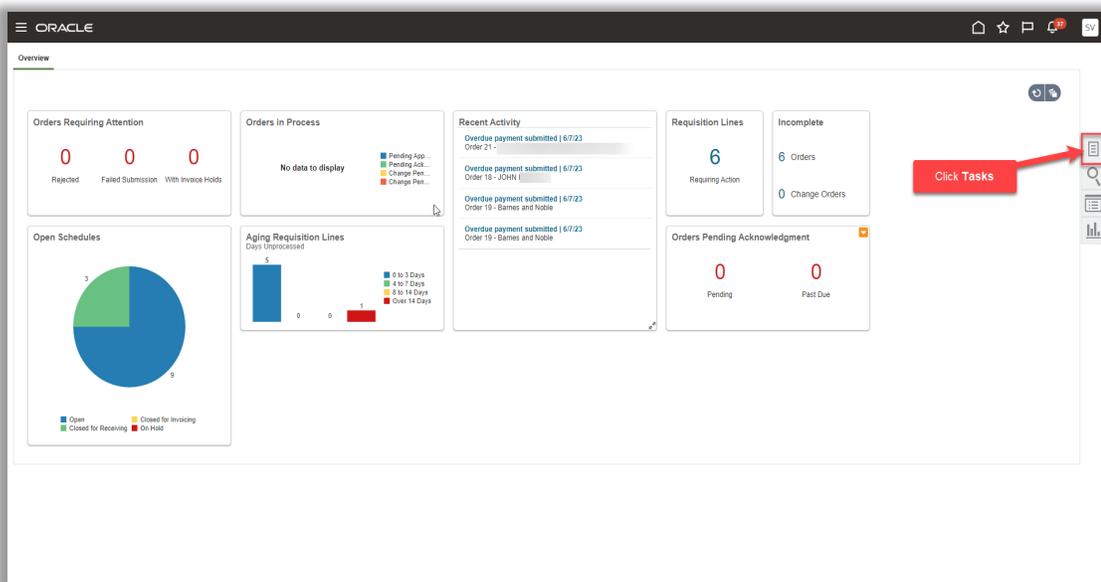
From home screen, click **Procurement**



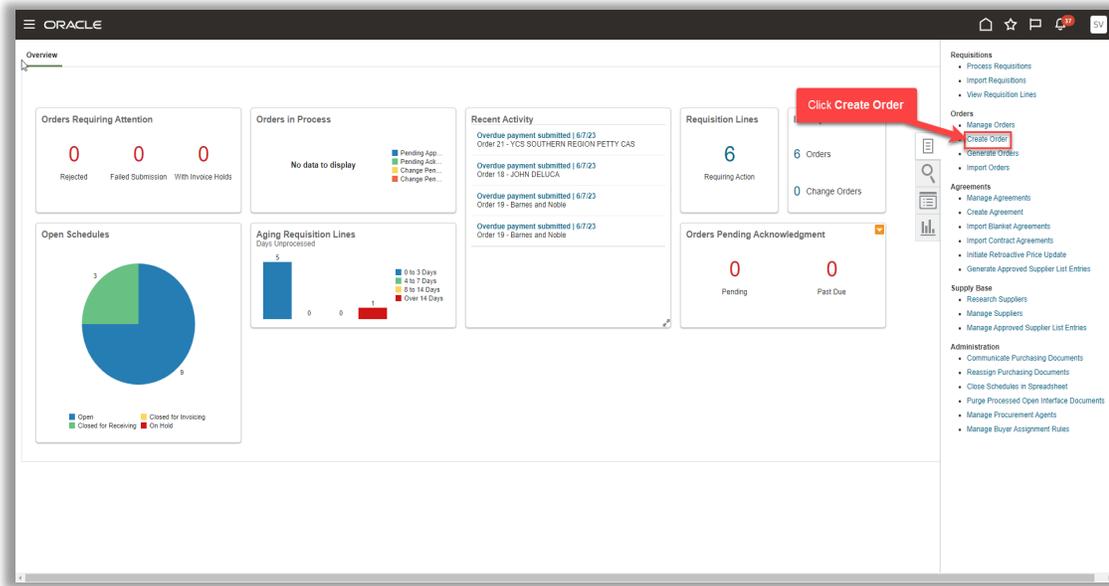
Next, click **Purchase Orders**



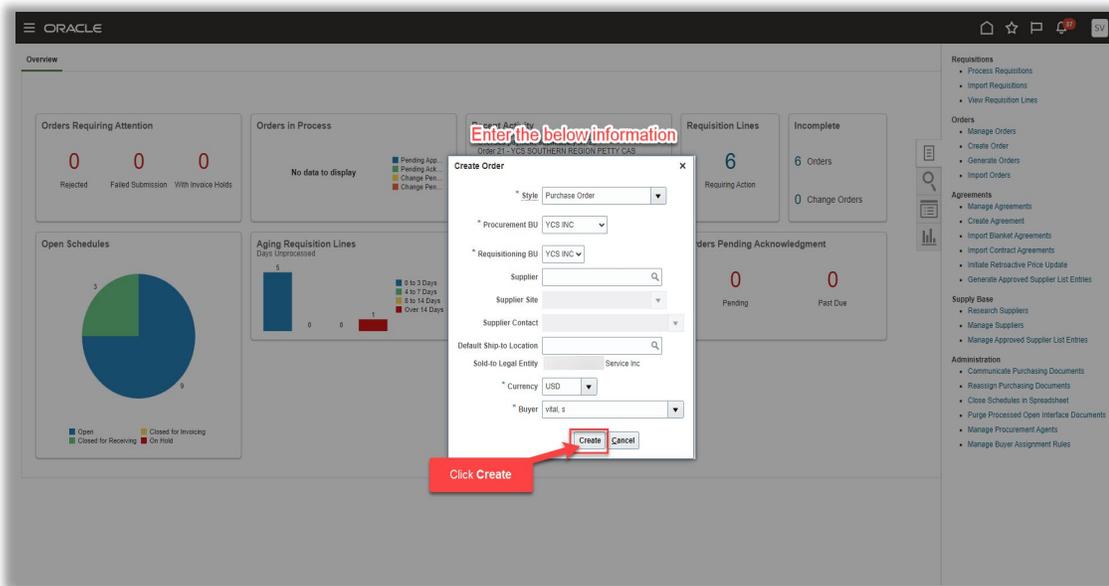
## Click Tasks



## Click Create Order



Enter the below information and click **Create**



Review the below information and scroll down to Lines and click **Add Row**

Edit Document (Purchase Order): 26

Manage Approvals View PDF Actions Save Submit Cancel

Main

General

Review the below information

Procurement BU YCS INC  
 Requisitioning BU YCS INC  
 Sold to Legal Entity Youth Consultation Service Inc

Supplier  
 Supplier Site  
 Supplier Contact  
 Communication Method None  
 Bill-to Location  
 Default Ship-to Location

Currency USD  
 Ordered 0.00 USD  
 Total Tax 0.00 USD  
 Total 0.00 USD

Procurement Card  
 Description  
 Requisition  
 Agreement

Bill-to BU  
 Order 26  
 Status Incomplete  
 Buyer vbal\_s  
 Creation Date 6/9/23

Terms Notes and Attachments

Required Acknowledgment None  
 Acknowledge Within Days  
 Payment Terms Net 30

Shipping Method  
 Freight Terms  
 FOB

Additional Information

Context Prompt

Lines Schedules Distributions

Click Add Row

Actions View Format Freeze Detach Wrap

Line	Type	Edit Item	Description	Category Name	Quantity	UOM	Price	Ordered	Location
No data to display.									
Columns Hidden: 22									

Enter the information

Edit Document (Purchase Order): 26

Manage Approvals View PDF Actions Save Submit Cancel

Procurement BU YCS INC  
 Requisitioning BU YCS INC  
 Sold to Legal Entity Youth Consultation Service Inc

Supplier  
 Supplier Site  
 Supplier Contact  
 Communication Method None  
 Bill-to Location  
 Default Ship-to Location

Currency USD  
 Ordered 106.24 USD  
 Total Tax 0.00 USD  
 Total 106.24 USD

Procurement Card  
 Description  
 Requisition  
 Agreement

Bill to BU  
 Order 26  
 Status Incomplete  
 Buyer vbal\_s  
 Creation Date 6/9/23

Terms Notes and Attachments

Required Acknowledgment None  
 Acknowledge Within Days  
 Payment Terms Net 30

Shipping Method  
 Freight Terms  
 FOB

Additional Information

Context Prompt

Lines Schedules Distributions

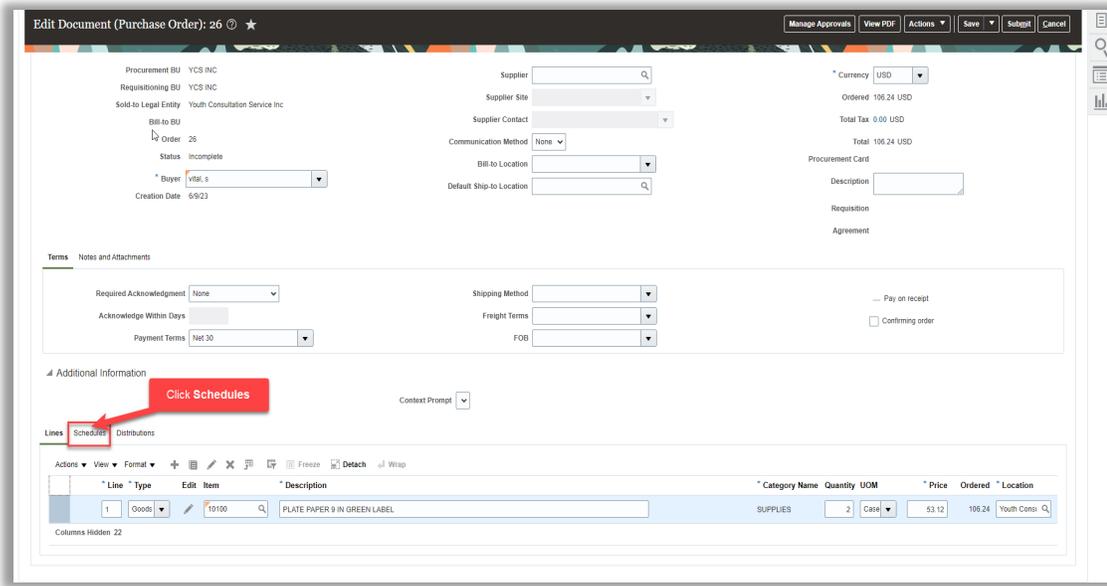
Enter the below information

Actions View Format Freeze Detach Wrap

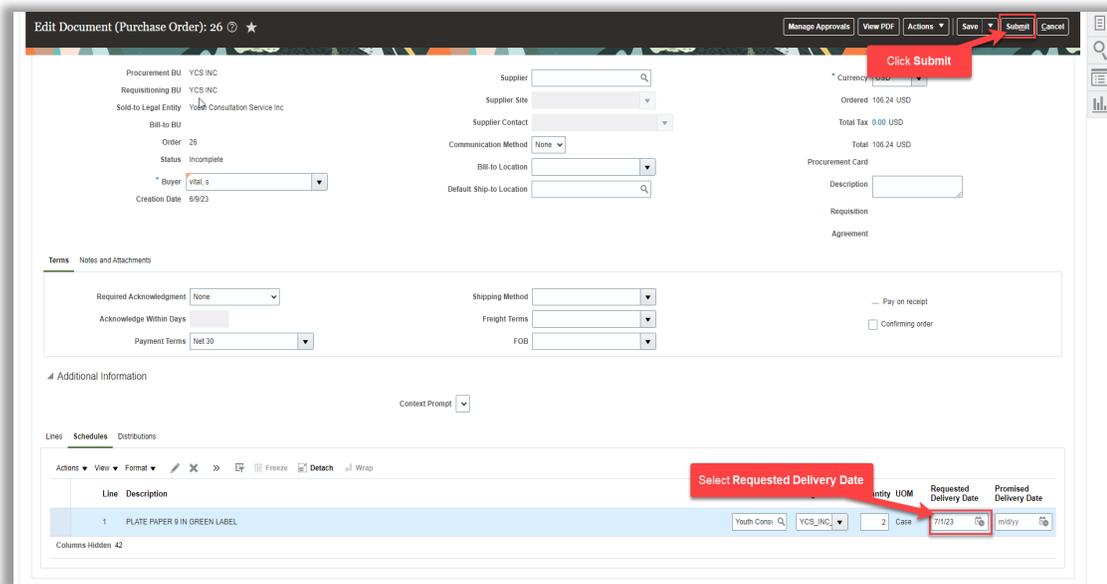
Line	Type	Edit Item	Description	Category Name	Quantity	UOM	Price	Ordered	Location
1	Goods	10100	PLATE PAPER 9 IN GREEN LABEL	SUPPLIES	2	Case	53.12	106.24	Youth Cons

Columns Hidden: 22

Click Schedules tab



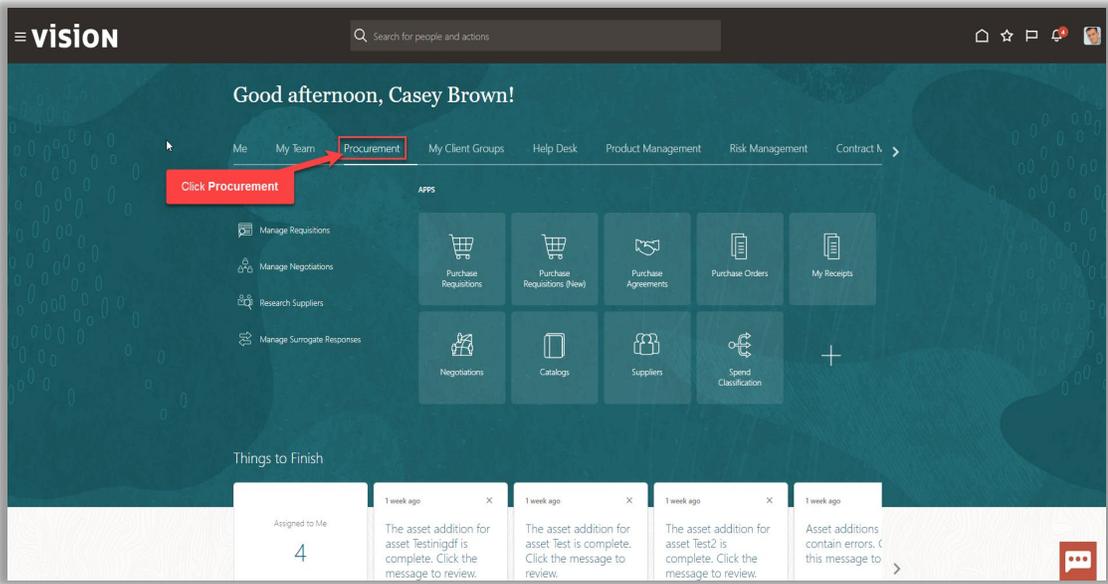
Select Requested Delivery Date and click Submit



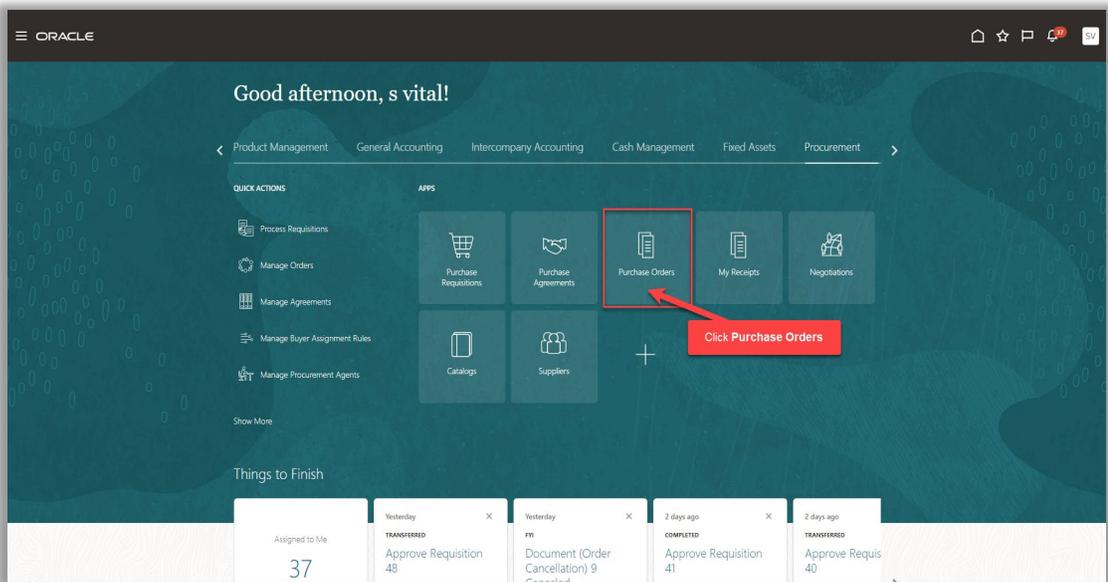
## Create Change Order

Navigation: Home>Procurement>Purchase Orders>Tasks>Manage Order>Update Information>Submit

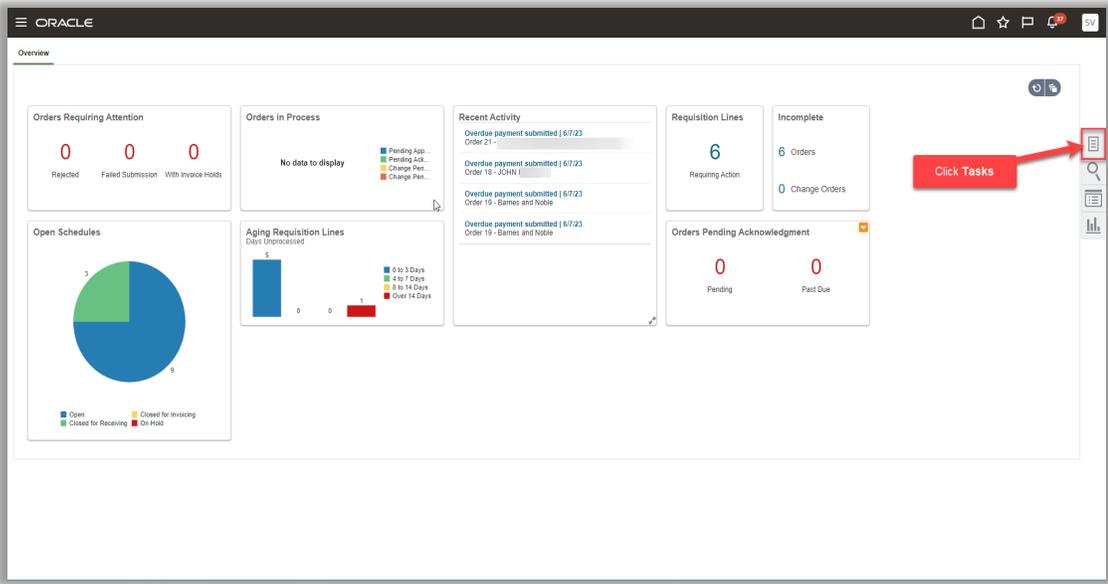
From home screen, click **Procurement**



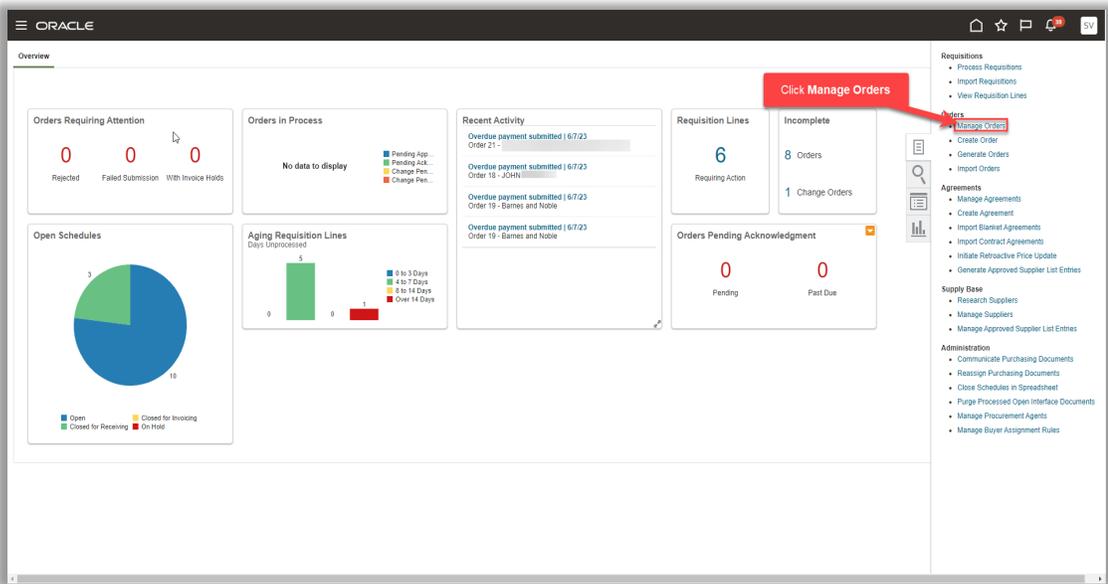
Next, click **Purchase Orders**



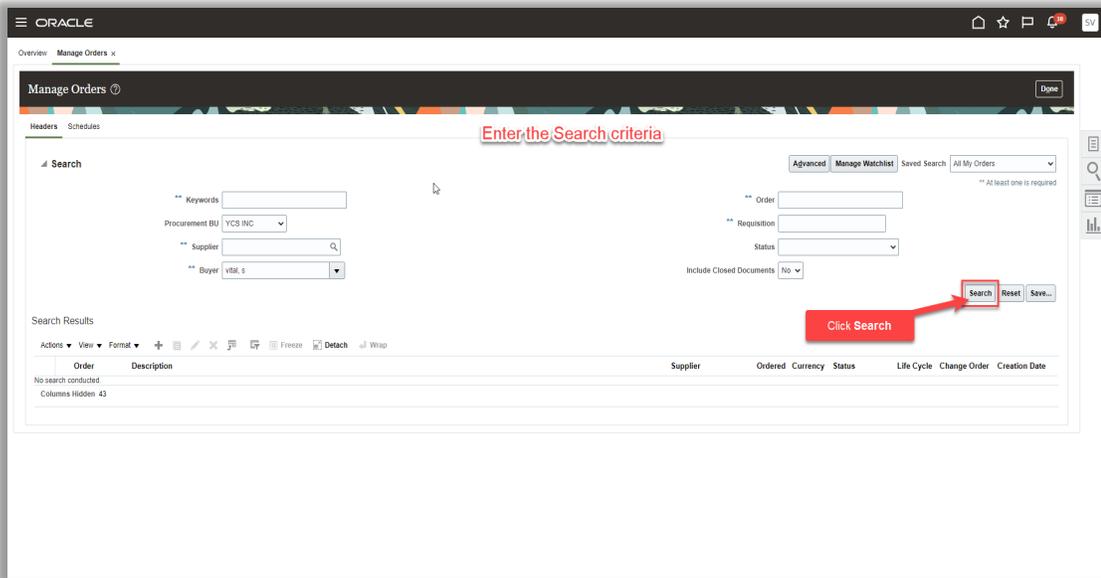
Click **Tasks**



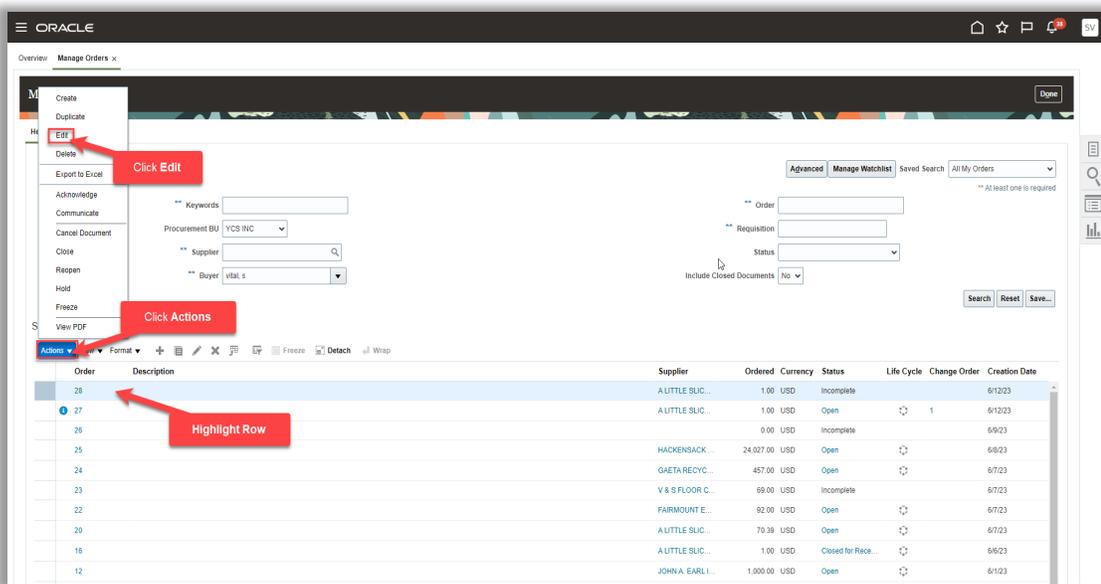
Click Manage Orders



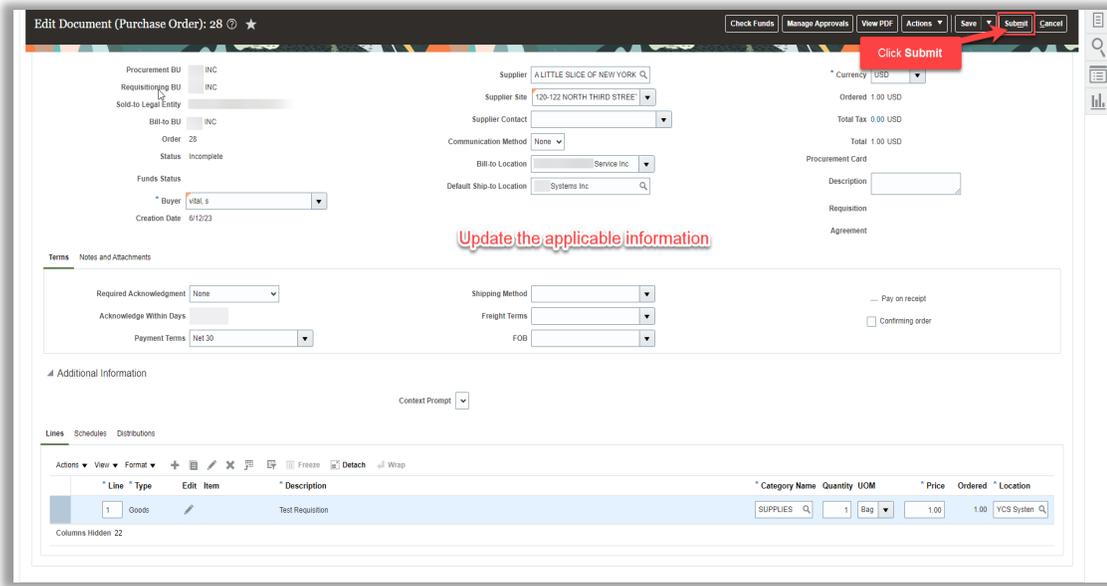
Next, enter the Search details and click Search



Highlight the row for the Order and click **Actions** then **Edit**



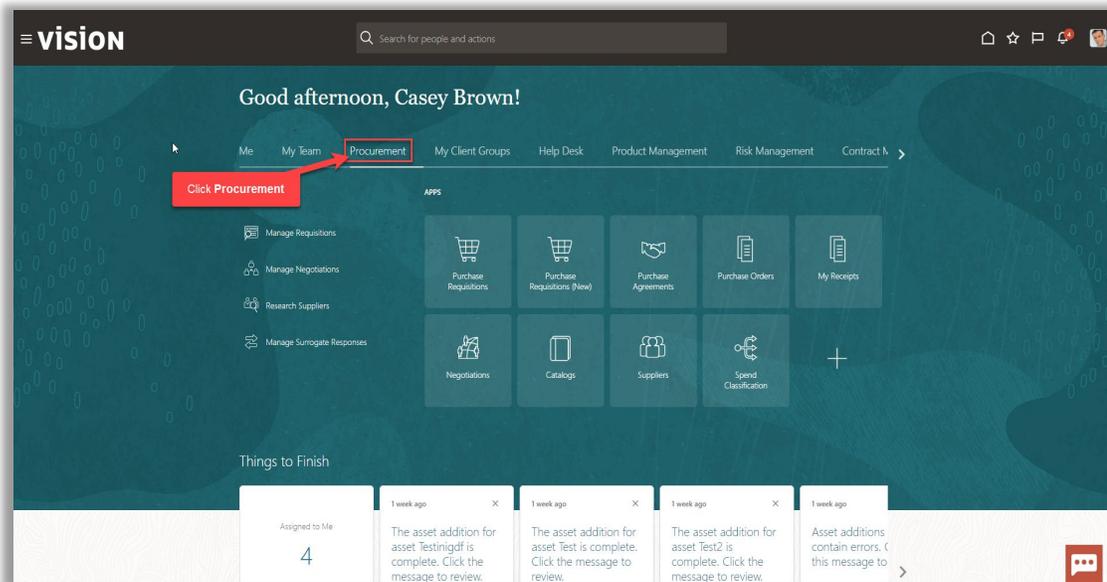
Update the applicable information and click **Submit**



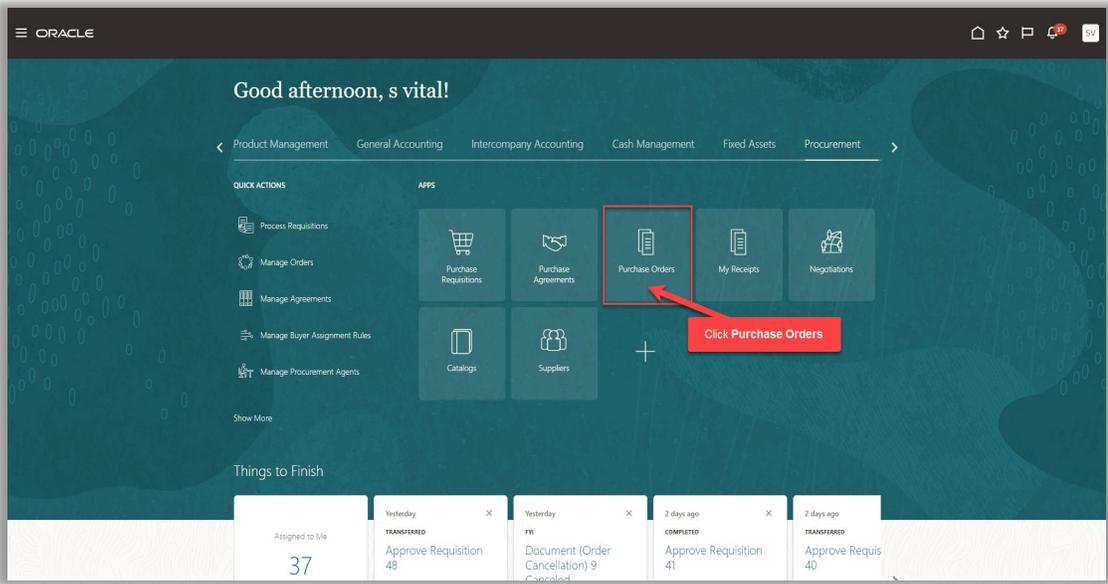
## Create Blank Purchase Agreement

Navigation: Home>Procurement>Purchase Orders>Tasks>Manage Order>Update Information>Submit

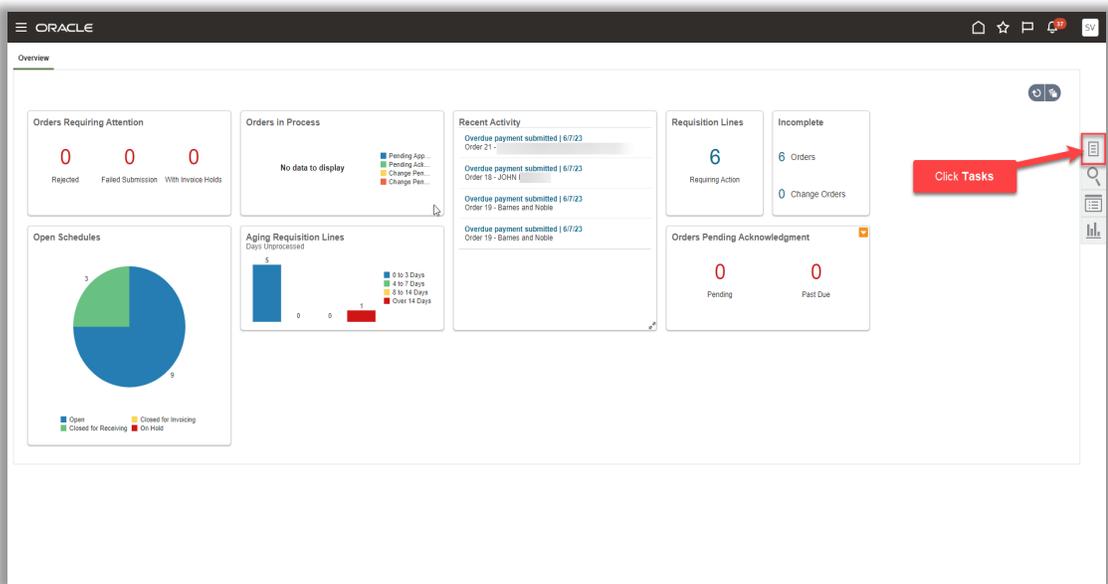
From home screen, click **Procurement**



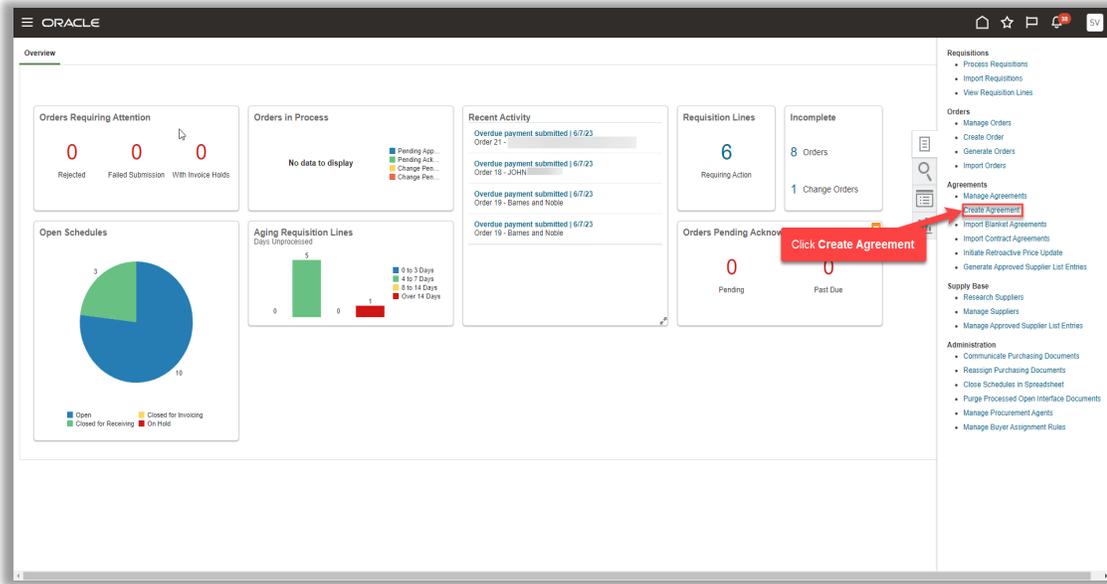
Next, click **Purchase Orders**



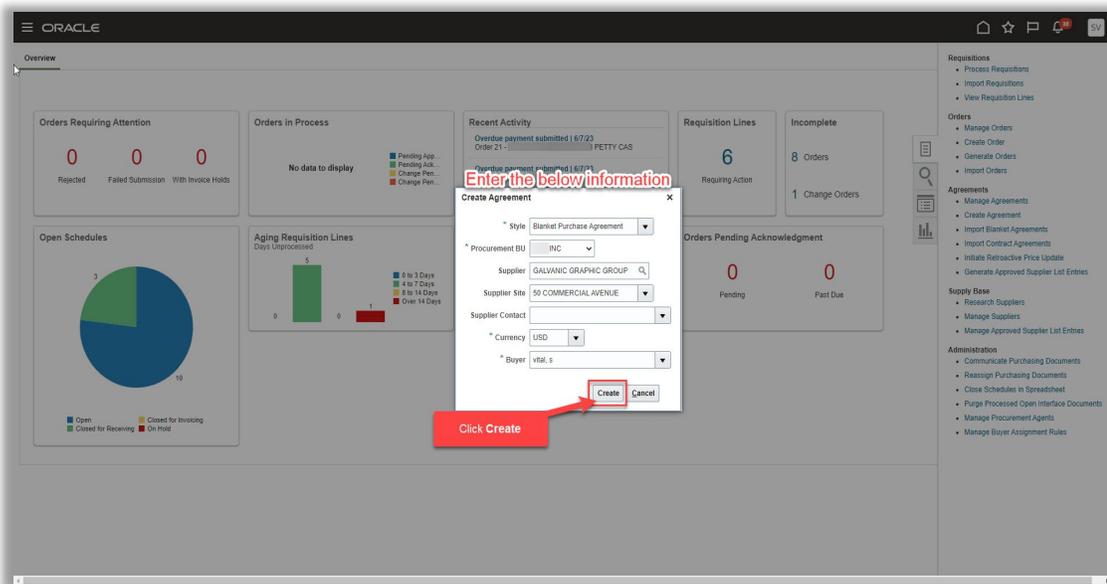
## Click Tasks



## Click Create Agreement



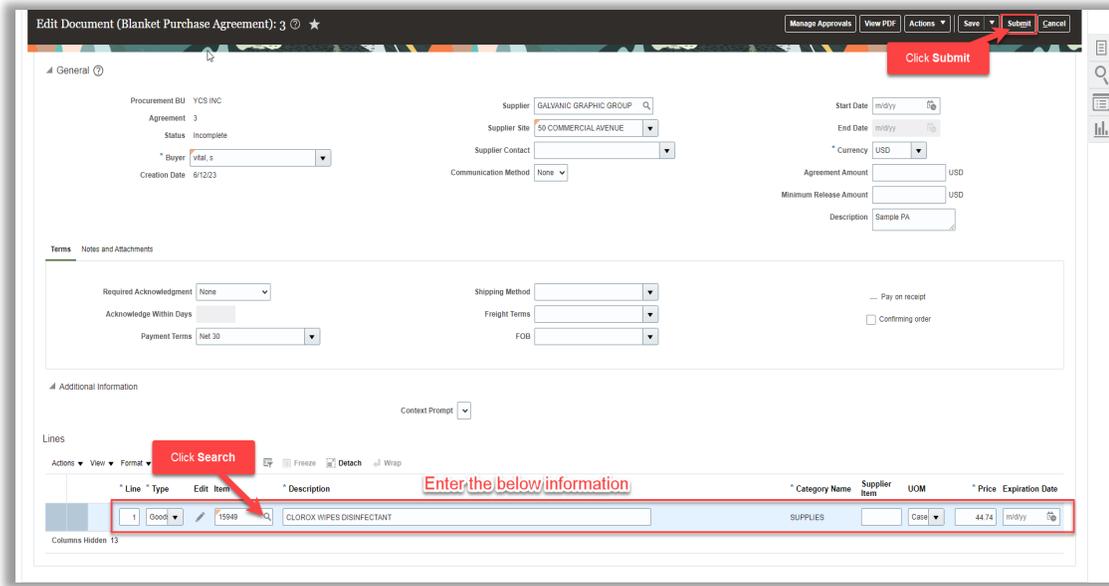
Enter the Create Agreement details and click **Create**



Enter the **Blank Purchase Agreement** details and scroll down to the **Lines** section

Click Add Row

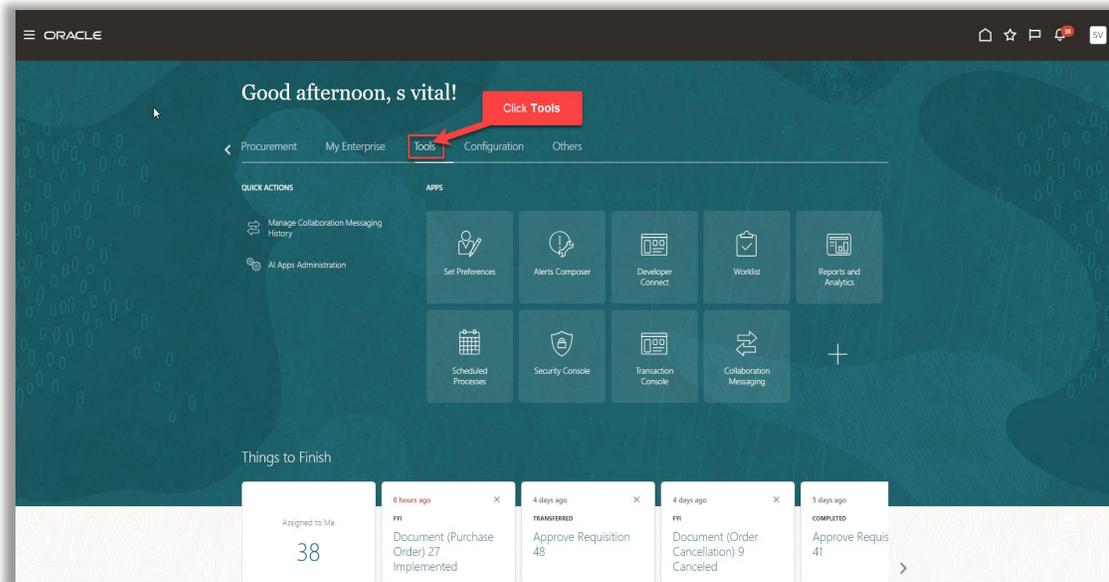
Enter the required information. To search for the **Item**, click the magnifying glass. Once the required information is entered, click **Submit**



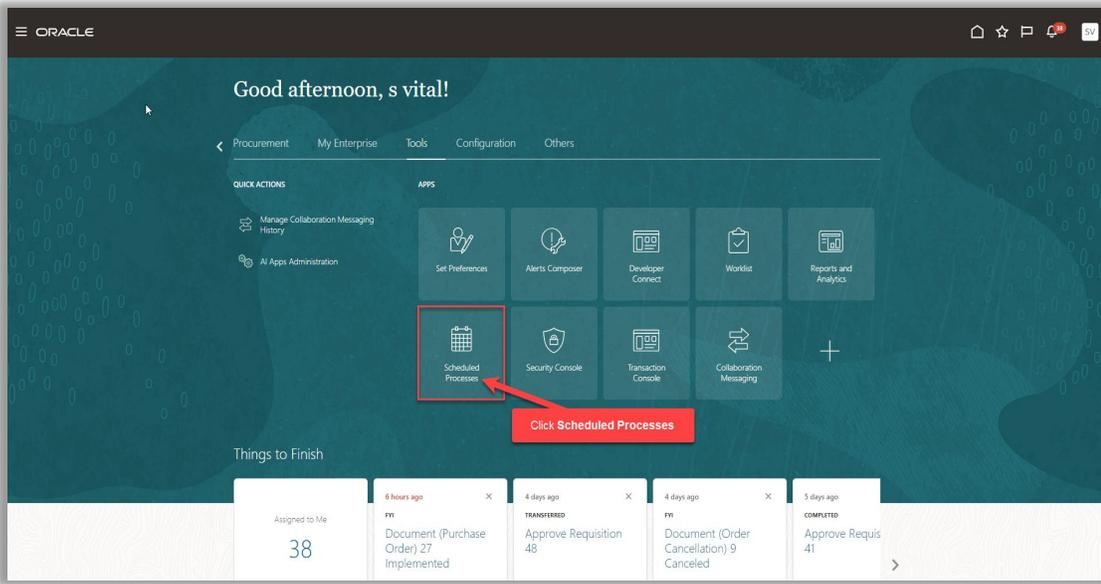
## Generate Period End Accruals

Navigation: Home>Tools>Scheduled Processes>Schedule New Process>Search for Process Name>Submit

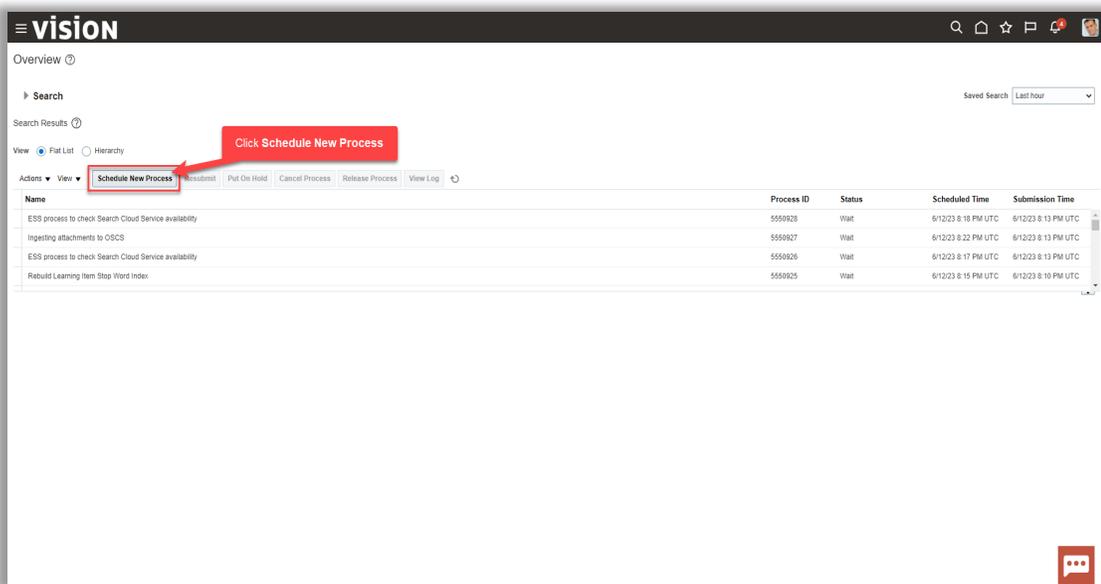
From home screen, click **Tools**



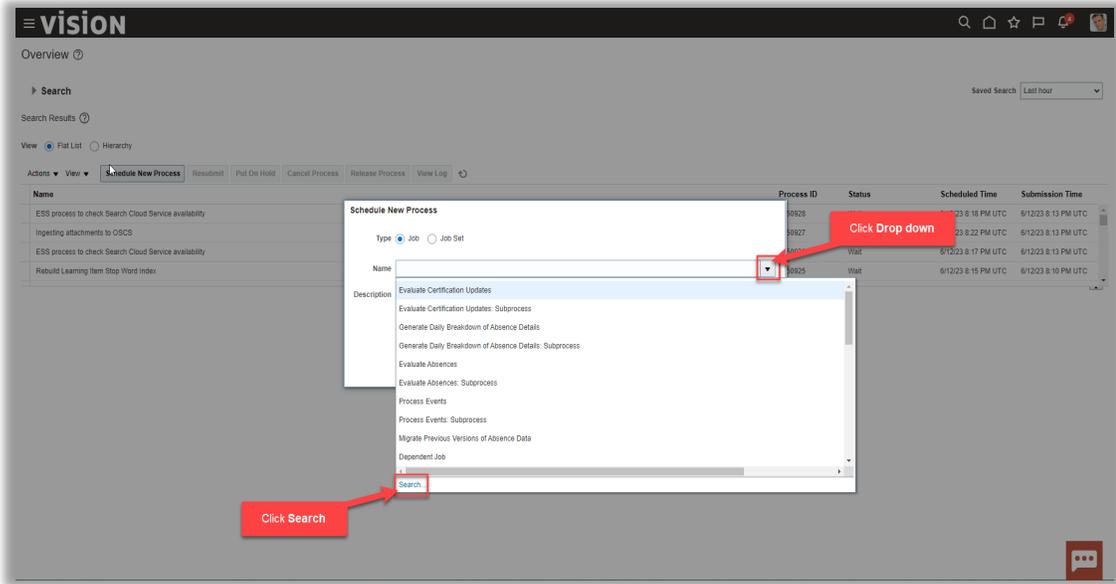
Next, click **Scheduled Processes**



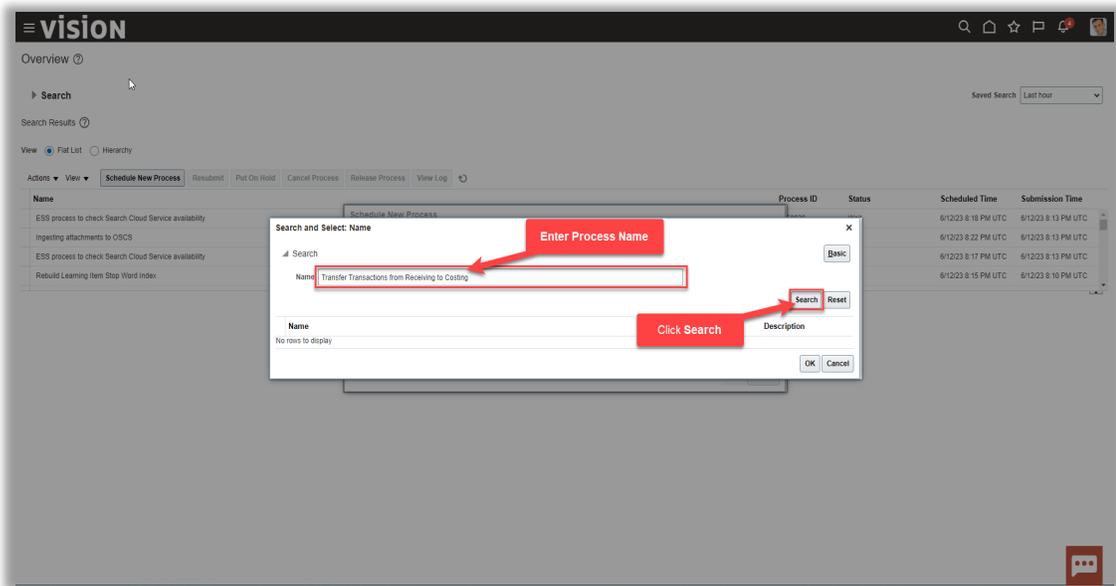
Click Schedule New Process



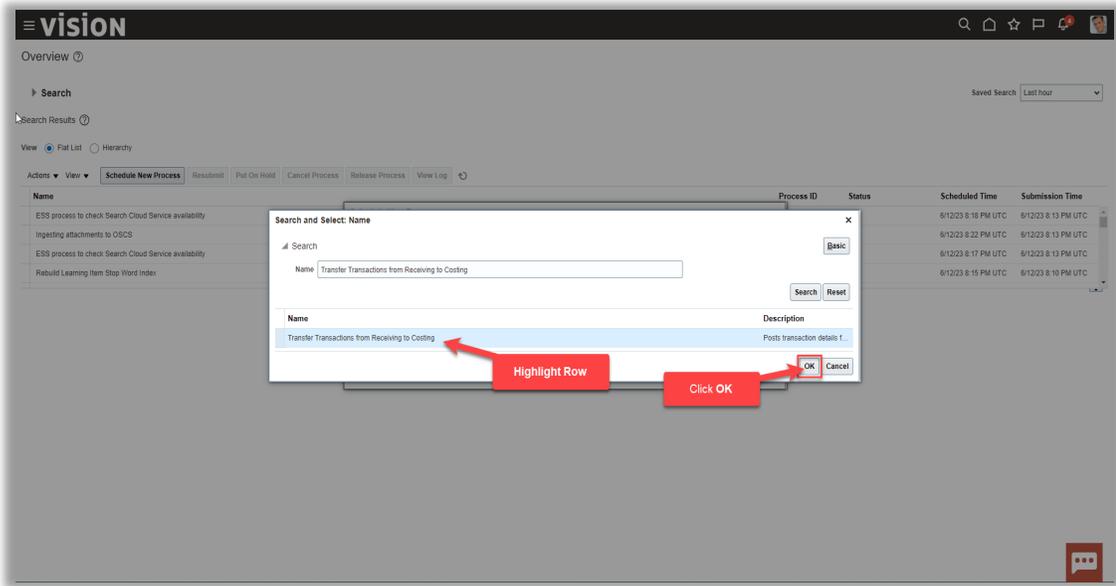
From the dropdown, click Search



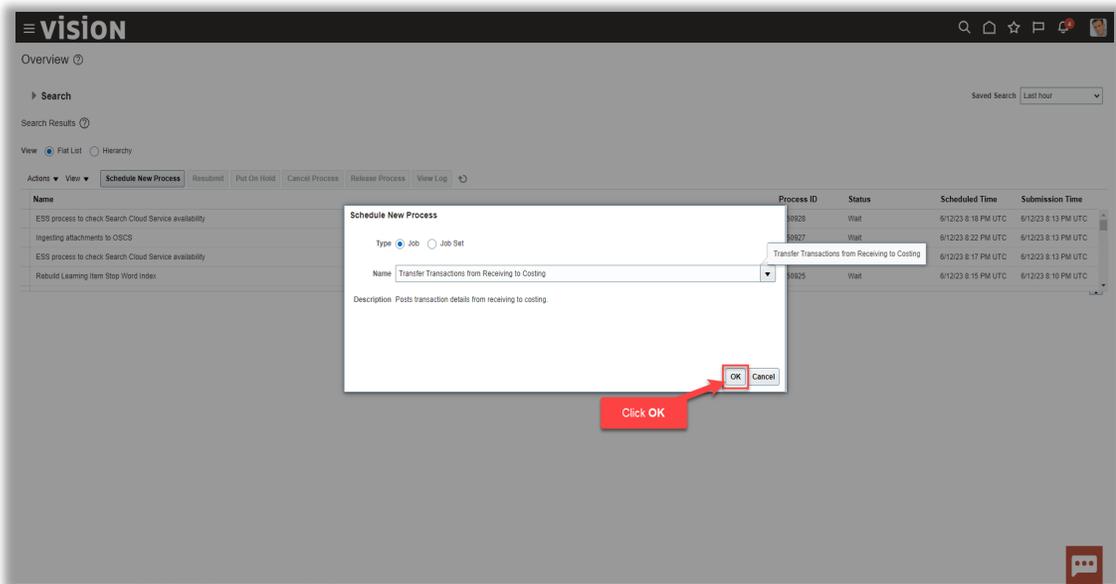
Enter Transfer Transactions from Receiving to Costing and click Search



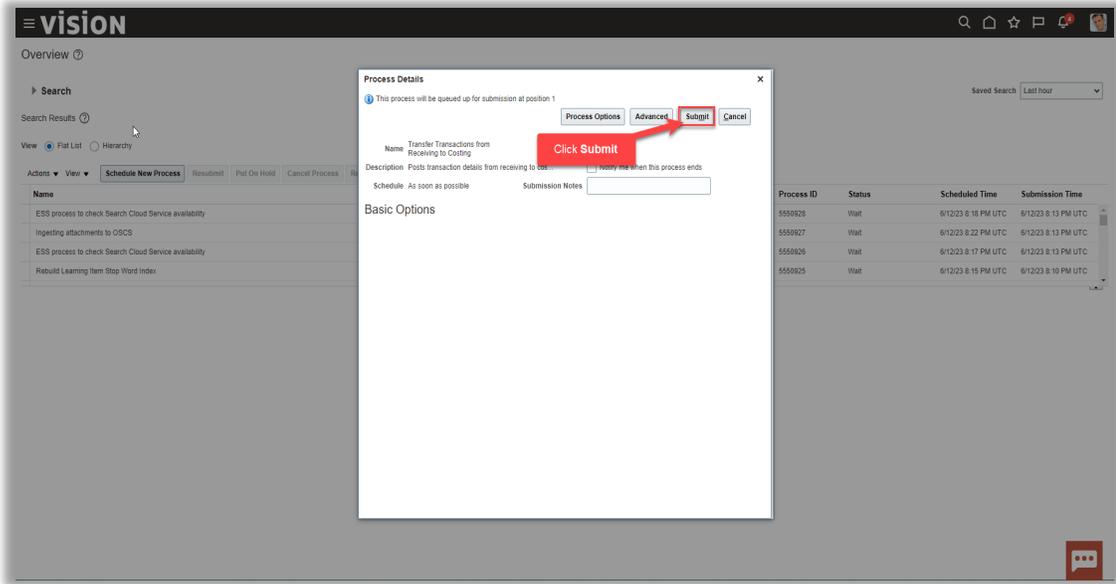
Highlight the row and click OK



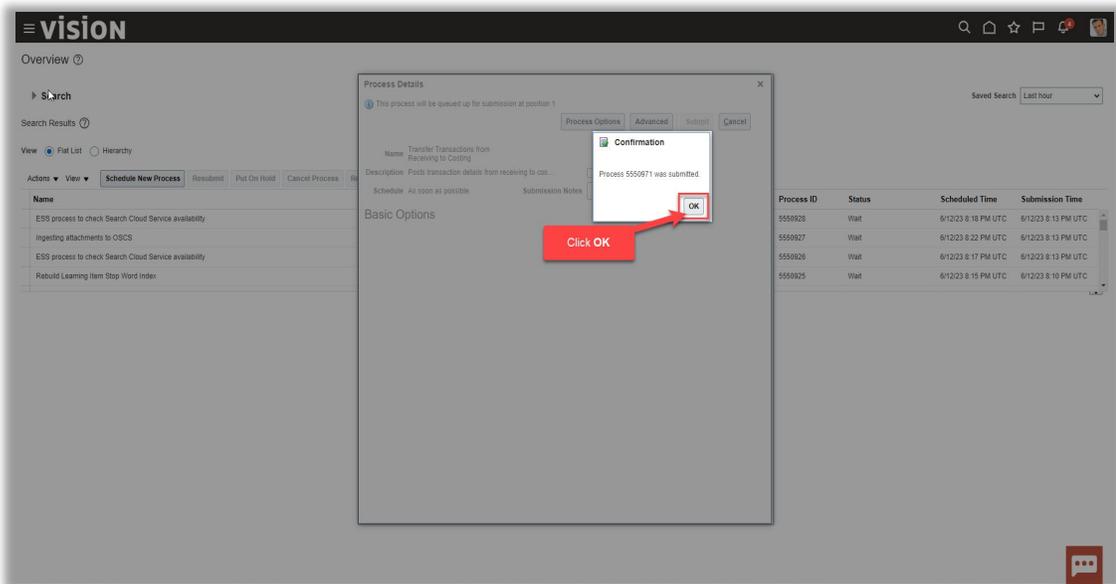
Click OK



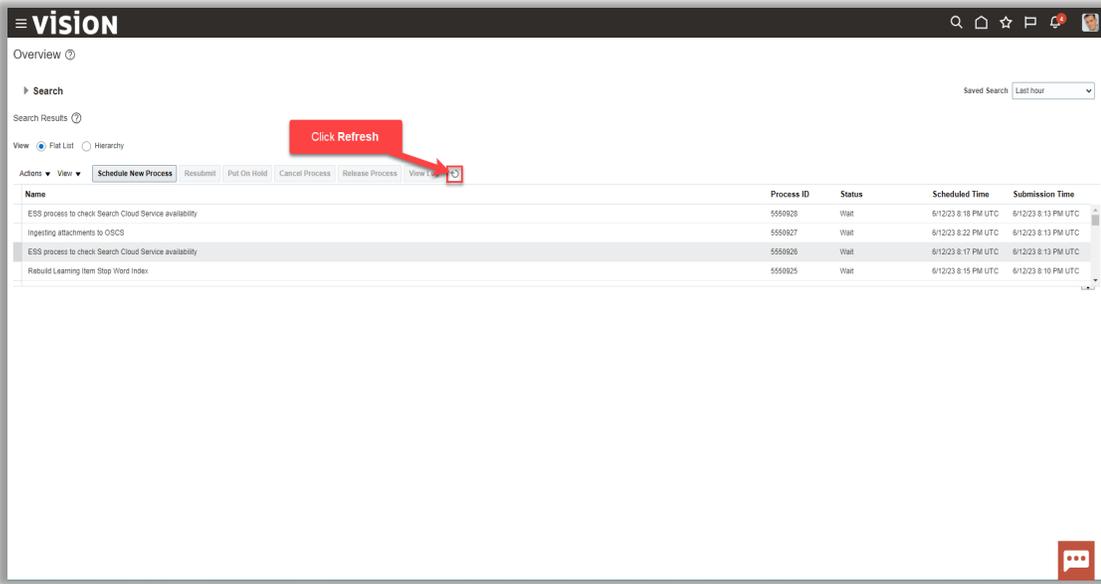
Click **Submit**. As a note, some processes will require us to enter **Basic Options** prior to clicking Submit



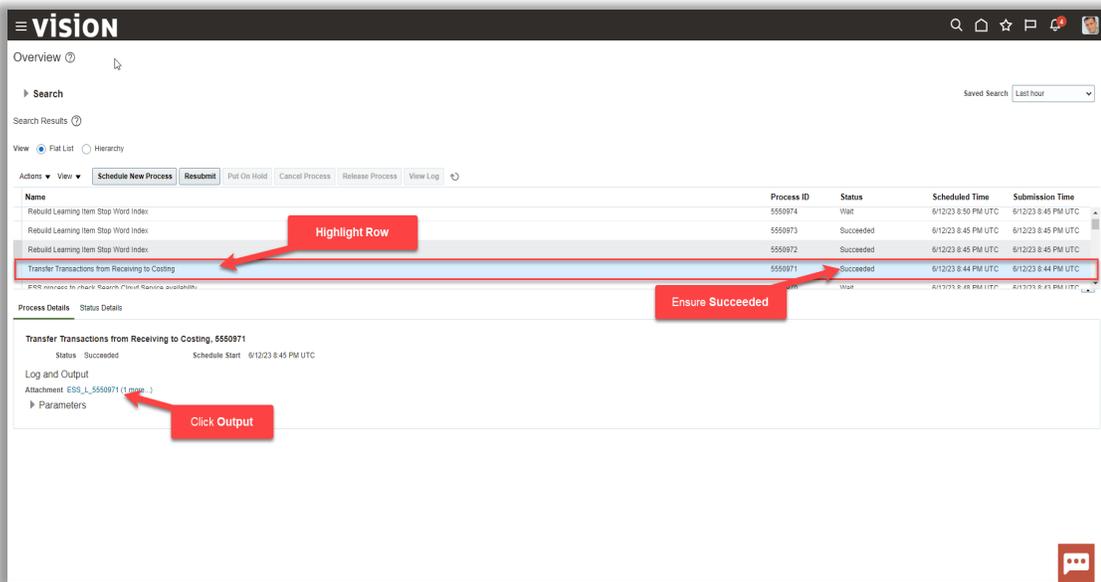
Click OK



Click Refresh



Once Succeeded, highlight the row to view the **Process Details**. Click the **Output** to view the Report results

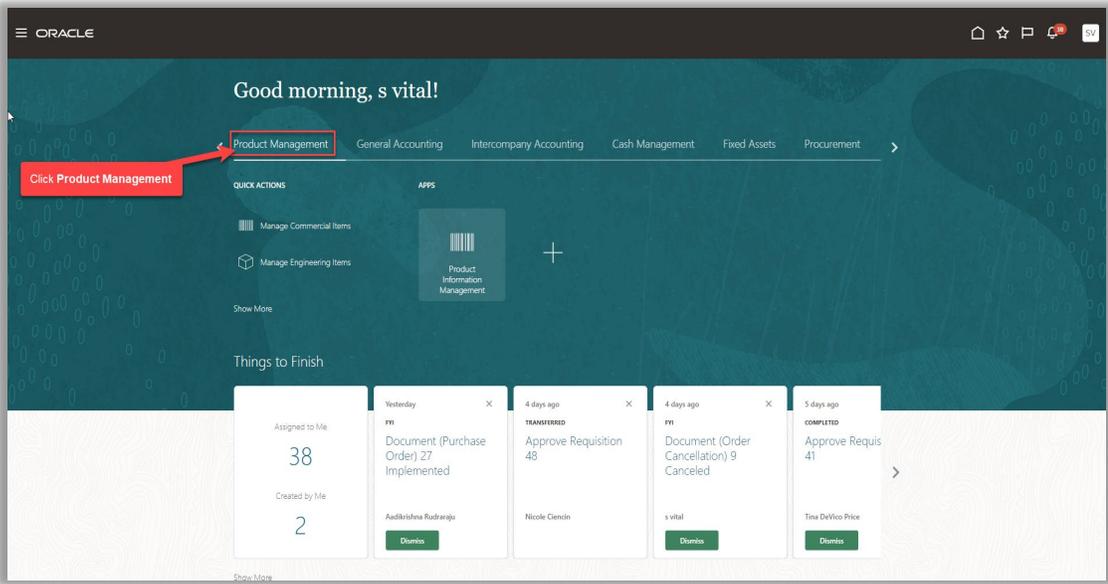


Follow this same process and run the following Scheduled Processes: Transfer Costs to Cost Management, Create Uninvoiced Receipt Accrual, and Uninvoiced Receipt Accrual Report.

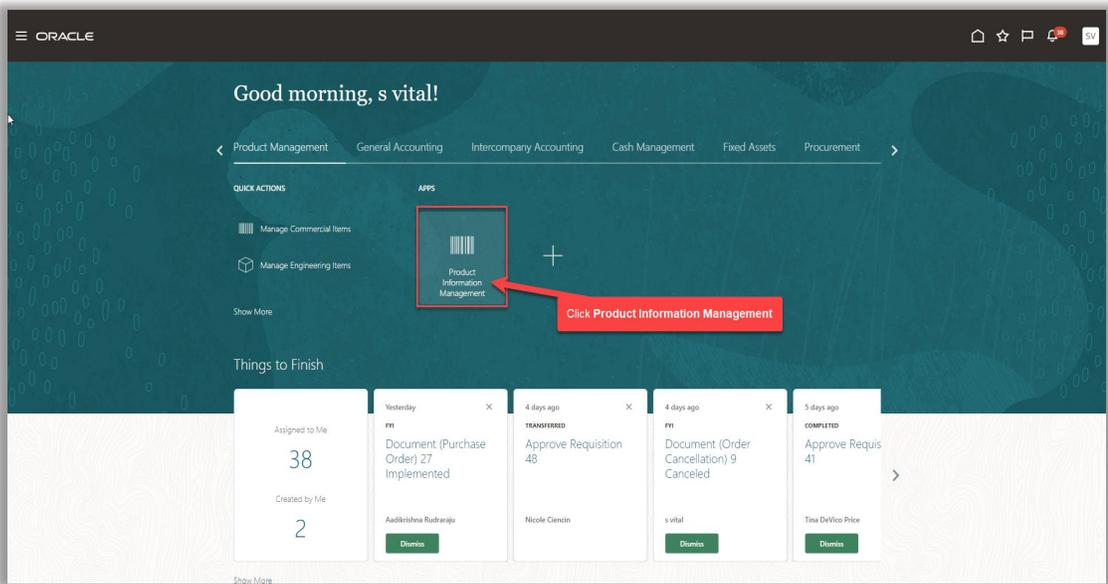
## Create Item

Navigation: Home>Product Management>Product Information Management>Tasks>Create New>Enter the details>Save and Close

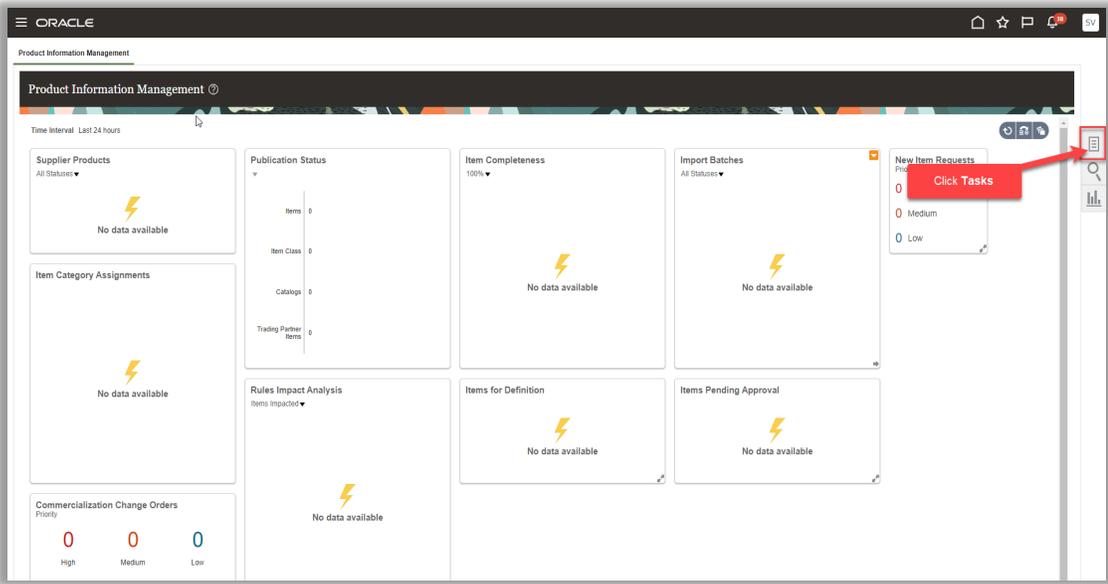
From home screen, click **Product Management**



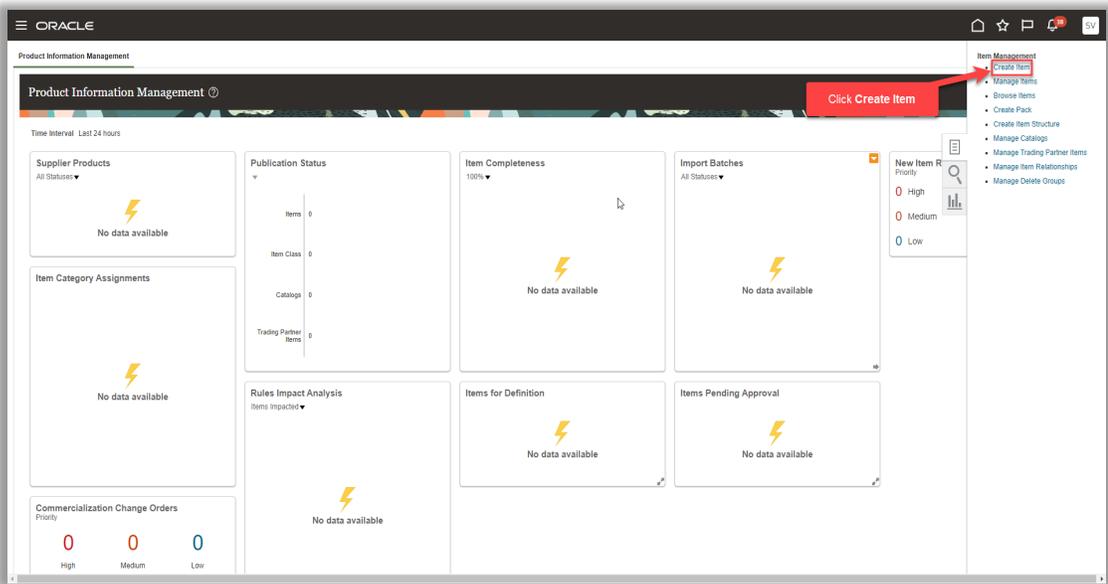
Next, click **Product Information Management**



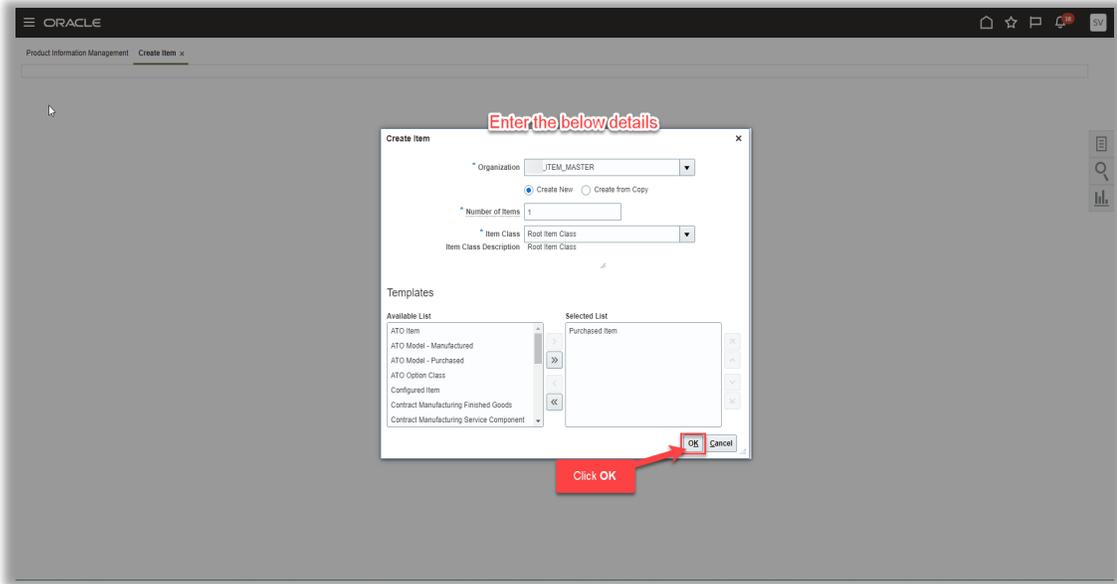
Click **Tasks**



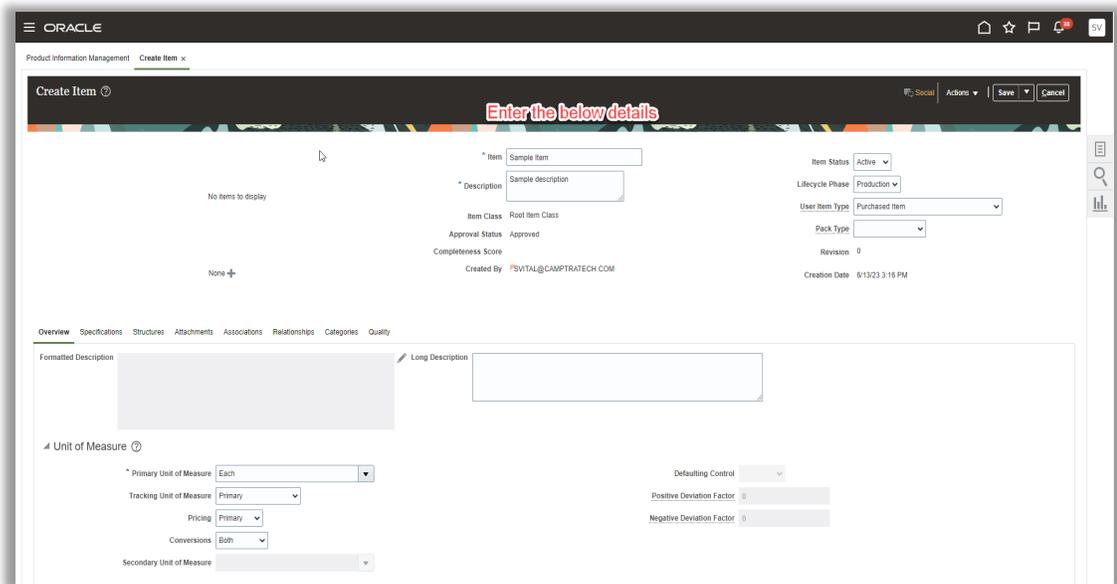
Click Create Item



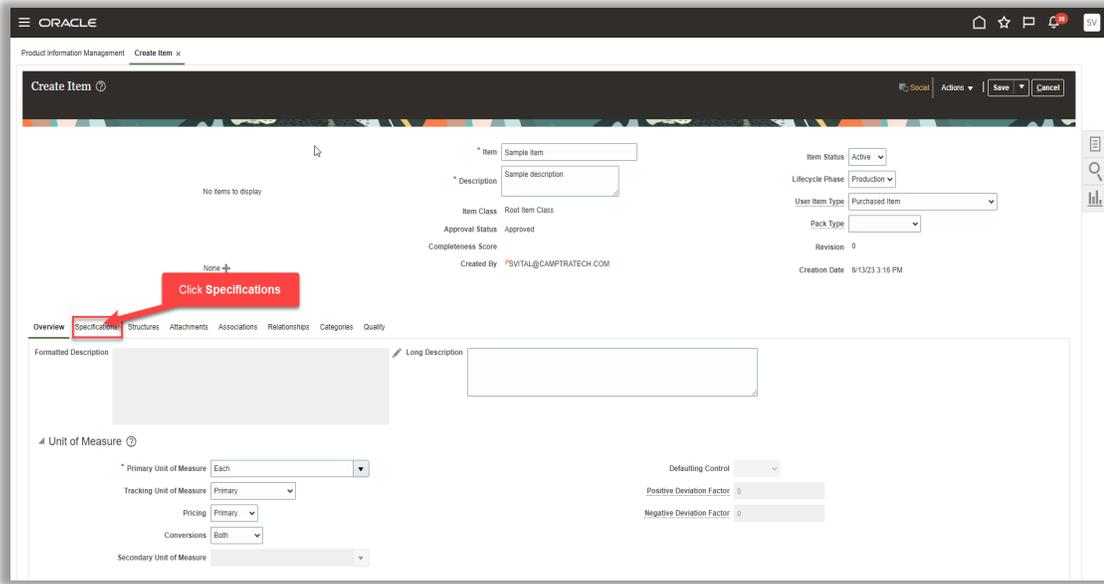
Enter the **Create Item** Details. In the **Selected List** box, ensure Purchased Item is an item in this box (refer to below screenshot). Click **Ok**



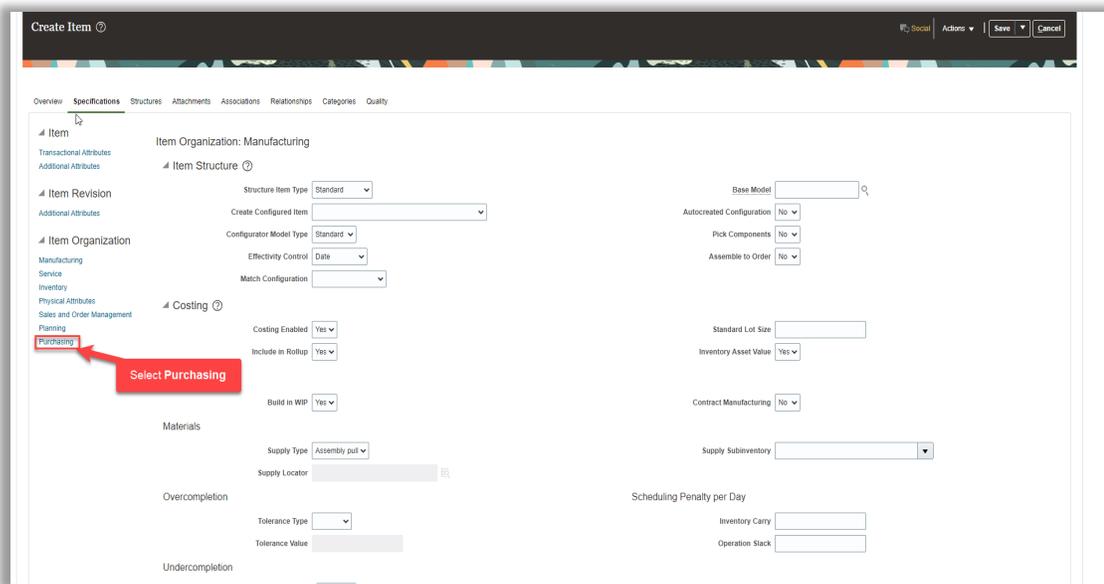
Enter the **Create Item** details such as the Item Name, Description, etc.



Next, click **Specifications** tab



## Select Purchasing



## Enter the List Price

**Create Item** Save Cancel

Transaction Date: 6/13/23 1:16 PM

Overview **Specifications** Structures Attachments Associations Relationships Categories Quality

**Item**  
Transactional Attributes  
Additional Attributes

**Item Revision**  
Additional Attributes

**Item Organization**  
Manufacturing  
Service  
Inventory  
Physical Attributes  
Sales and Order Management  
Planning  
Purchasing

**Item Organization: Purchasing**

**Purchasing**

Purchasable: Yes  
Use Approved Supplier: No  
Negotiation Required: [Dropdown]  
Input Tax Classification Code: [Dropdown]  
Unit of Issue: [Dropdown]  
Invoice Close Tolerance Percentage: [Text]  
Hazard Class: [Dropdown]  
Asset Category: [Text]

**Pricing**

List Price: 26 USD  
Price Tolerance Percentage: [Text]  
Market Price: [Text] USD

**Outside Processing Item**

Outside Processing Service: No

**Receiving**

Purchasable: Yes  
Allow Purchasing Document Update: Yes  
Taxable: Yes  
Default Buyer: [Dropdown]  
Receipt Close Tolerance Percentage: [Text]  
UN Number: [Dropdown]

Rounding Factor: [Text]

**Invoice Matching**

Match Approval Level: [Dropdown]  
Invoice Match Option: [Dropdown]

**Enter List Price**

Click **Associations** tab

**Create Item** Save Cancel

Transaction Date: 6/13/23 1:16 PM

Overview **Specifications** Structures Attachments **Associations** Relationships Categories Quality

**Item**  
Transactional Attributes  
Additional Attributes

**Item Revision**  
Additional Attributes

**Item Organization**  
Manufacturing  
Service  
Inventory  
Physical Attributes  
Sales and Order Management  
Planning  
Purchasing

**Item Organization: Purchasing**

**Purchasing**

Purchasable: Yes  
Use Approved Supplier: No  
Negotiation Required: [Dropdown]  
Input Tax Classification Code: [Dropdown]  
Unit of Issue: [Dropdown]  
Invoice Close Tolerance Percentage: [Text]  
Hazard Class: [Dropdown]  
Asset Category: [Text]

**Pricing**

List Price: 26 USD  
Price Tolerance Percentage: [Text]  
Market Price: [Text] USD

**Outside Processing Item**

Outside Processing Service: No

**Receiving**

Purchasable: Yes  
Allow Purchasing Document Update: Yes  
Taxable: Yes  
Default Buyer: [Dropdown]  
Receipt Close Tolerance Percentage: [Text]  
UN Number: [Dropdown]

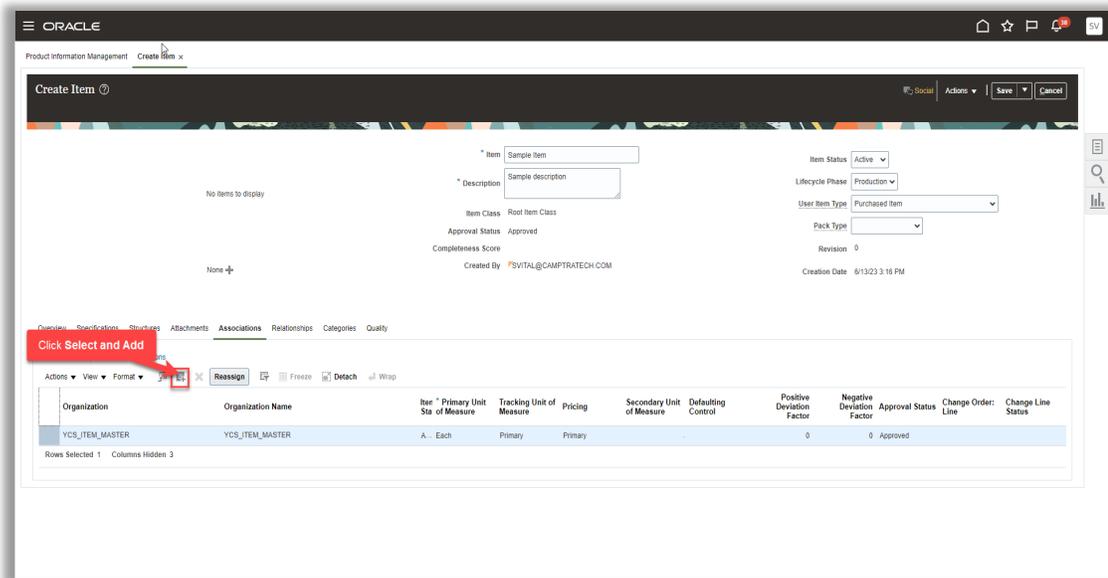
Rounding Factor: [Text]

**Invoice Matching**

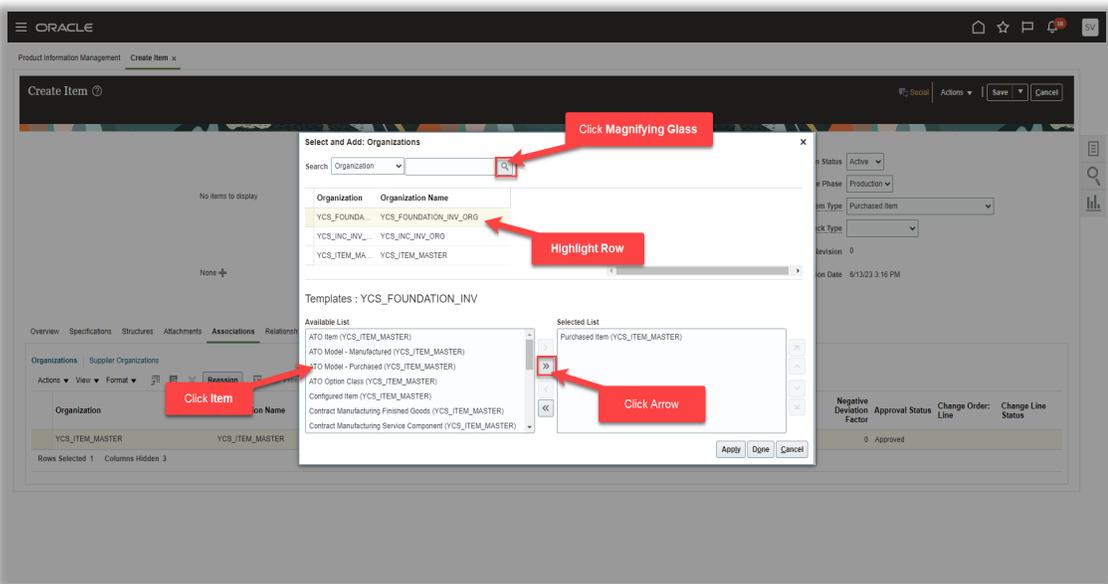
Match Approval Level: [Dropdown]  
Invoice Match Option: [Dropdown]

**Click Associations**

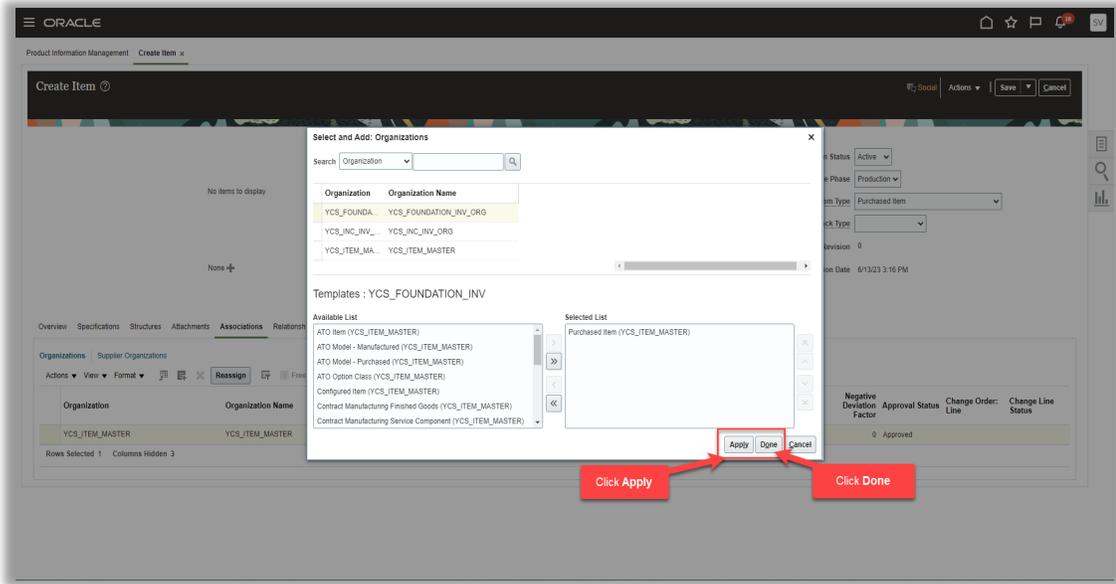
Click **Select and Add**



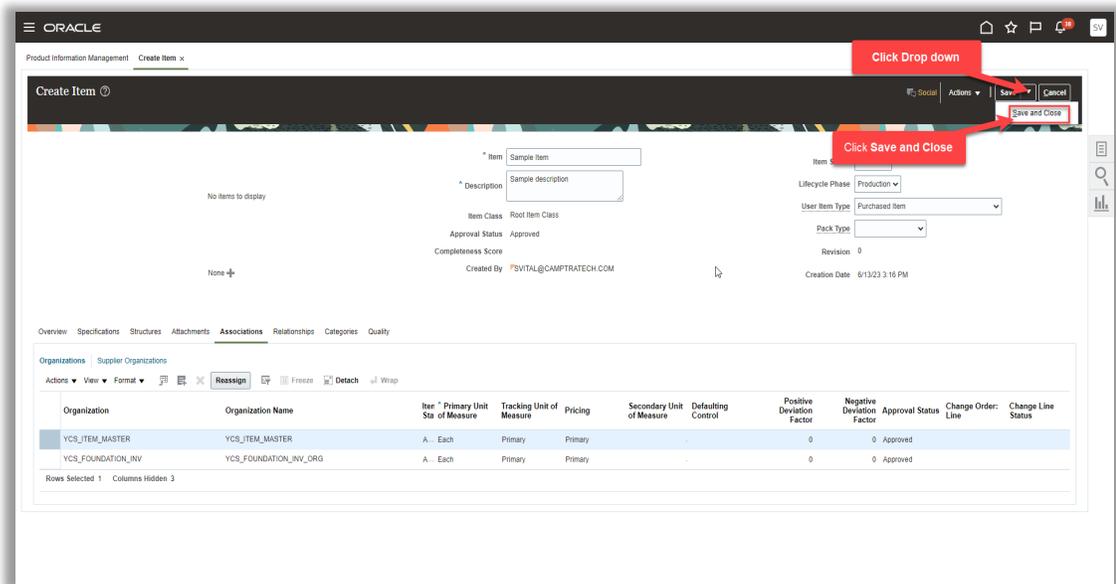
Add the **Inventory Organizations** by clicking the magnifying glass. Next, select the item from the **Available List** and move to the **Selected List** using the arrow.



Click **Apply** then **Done**



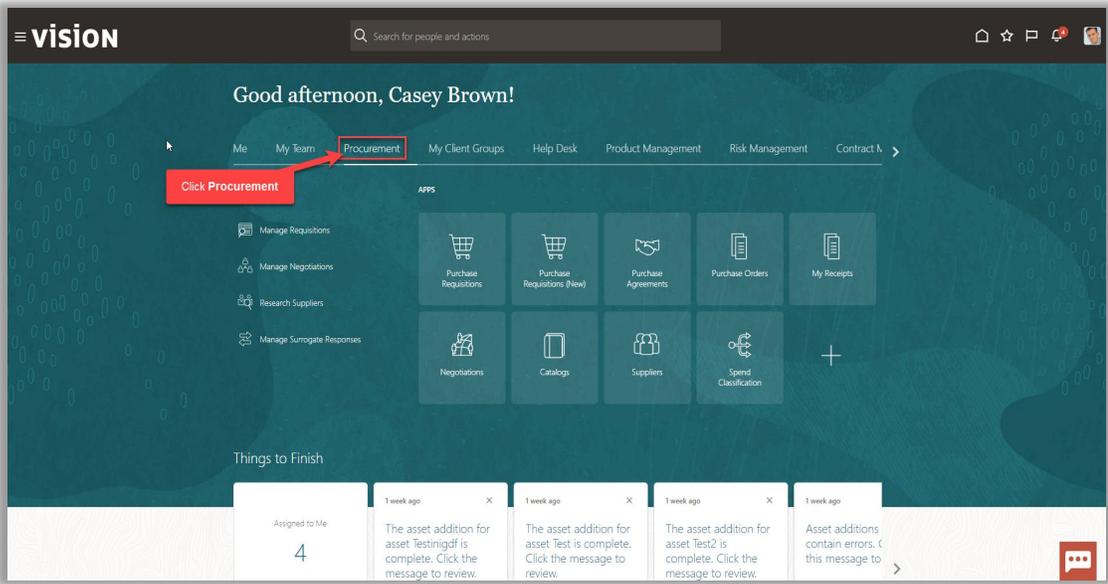
Click Save and Close



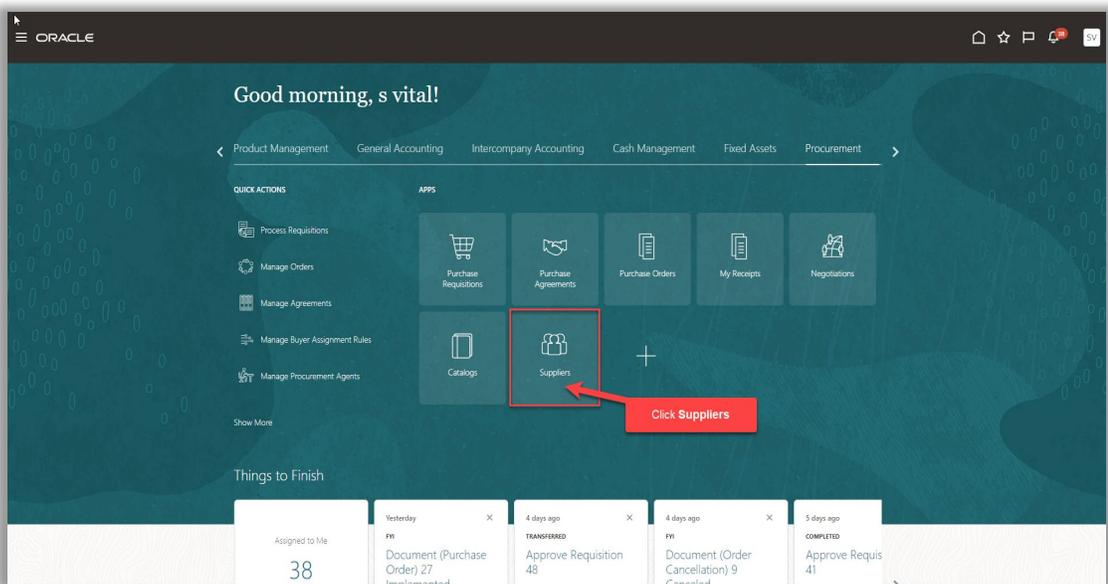
## Manage Suppliers

Navigation: Home>Procurement>Suppliers>Tasks>Manage Suppliers>Search>Review or Update Details>Save and Close

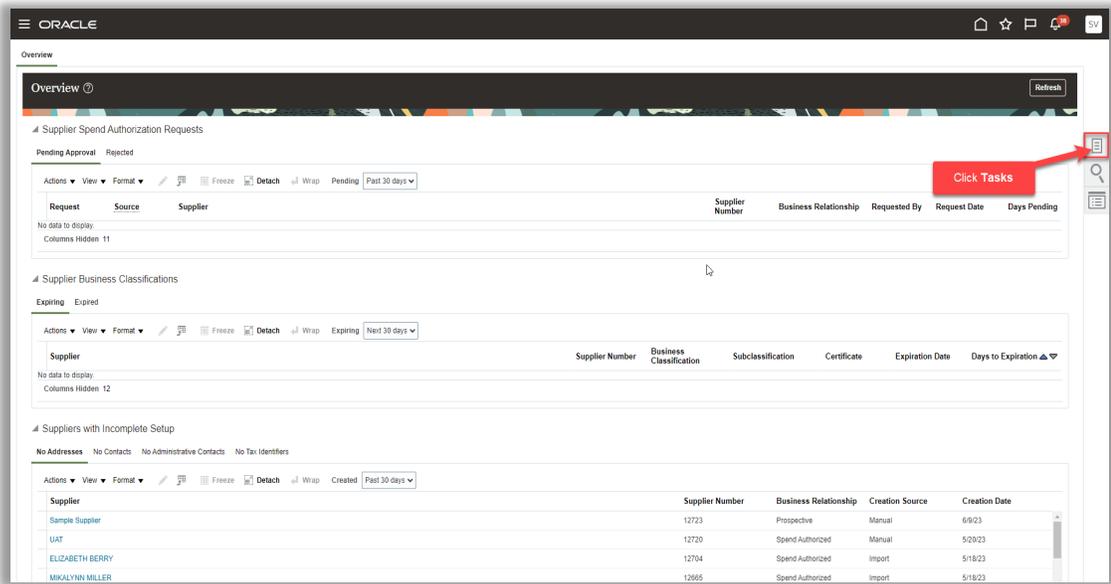
From home screen, click **Procurement**



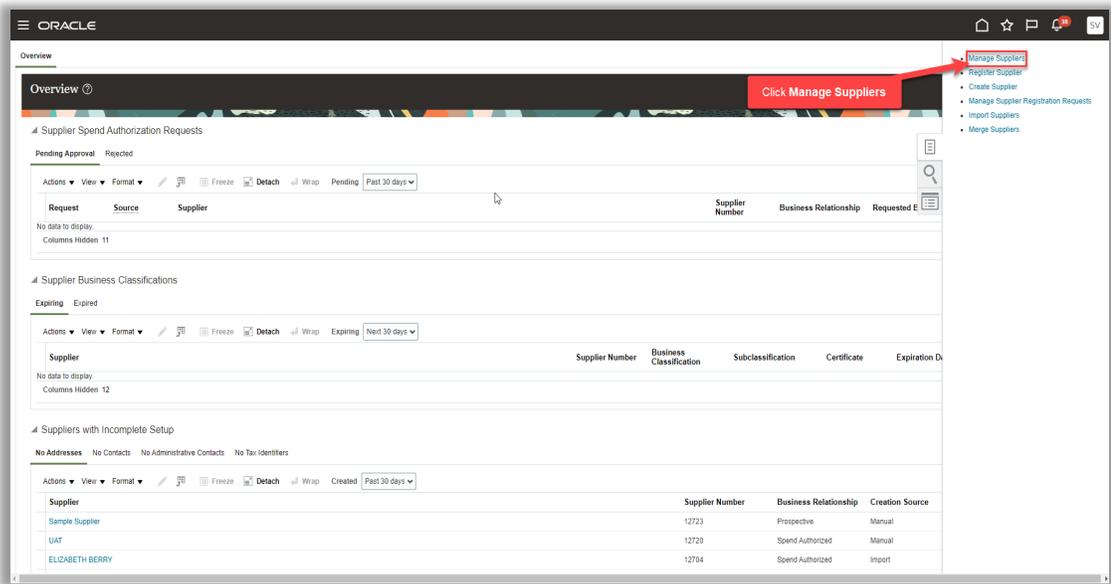
Next, click **Suppliers**



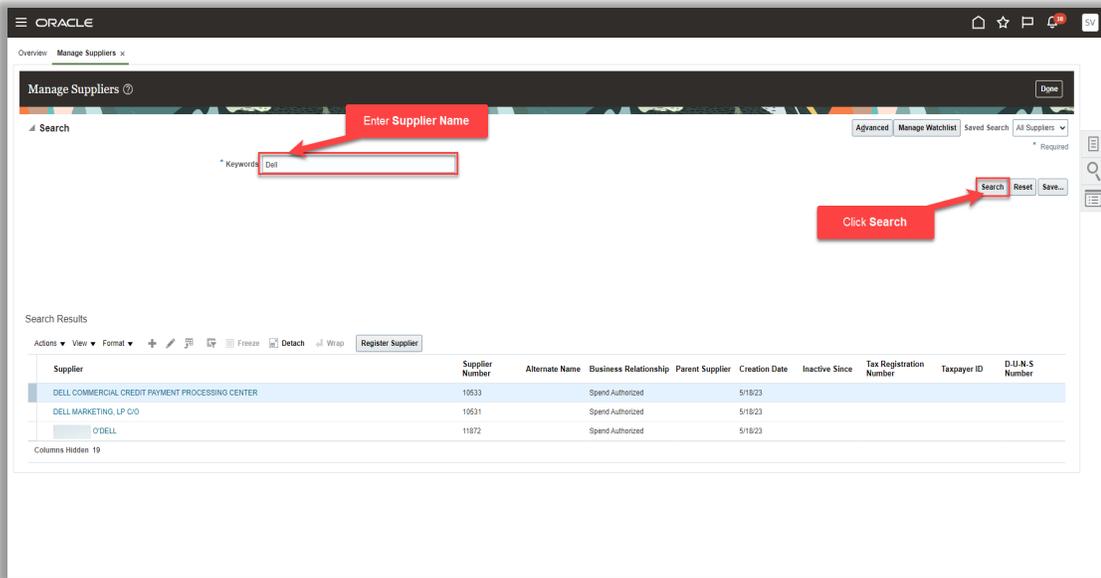
Click **Tasks**



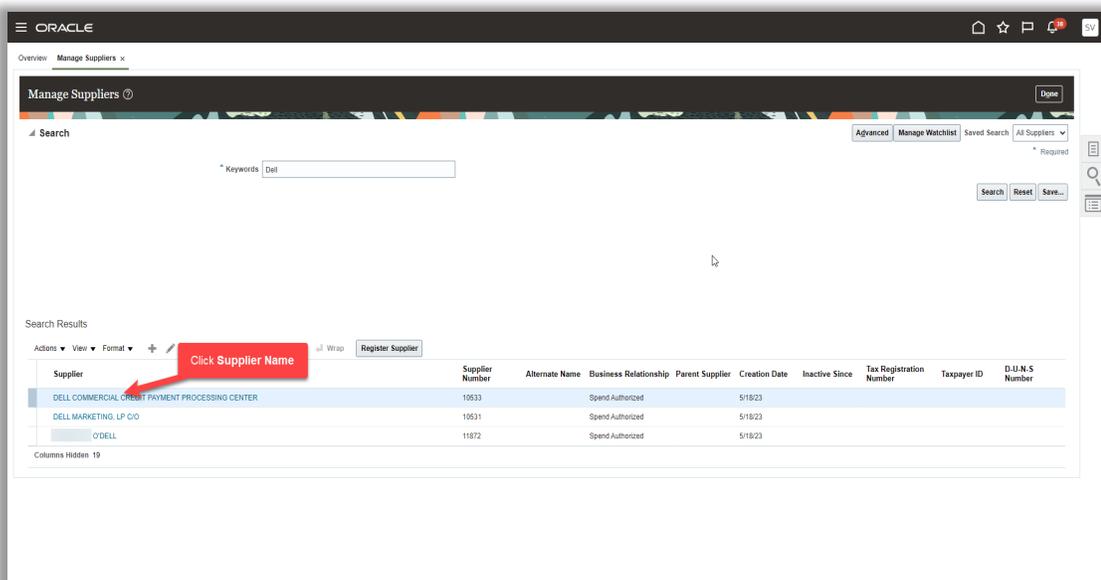
Click Manage Suppliers



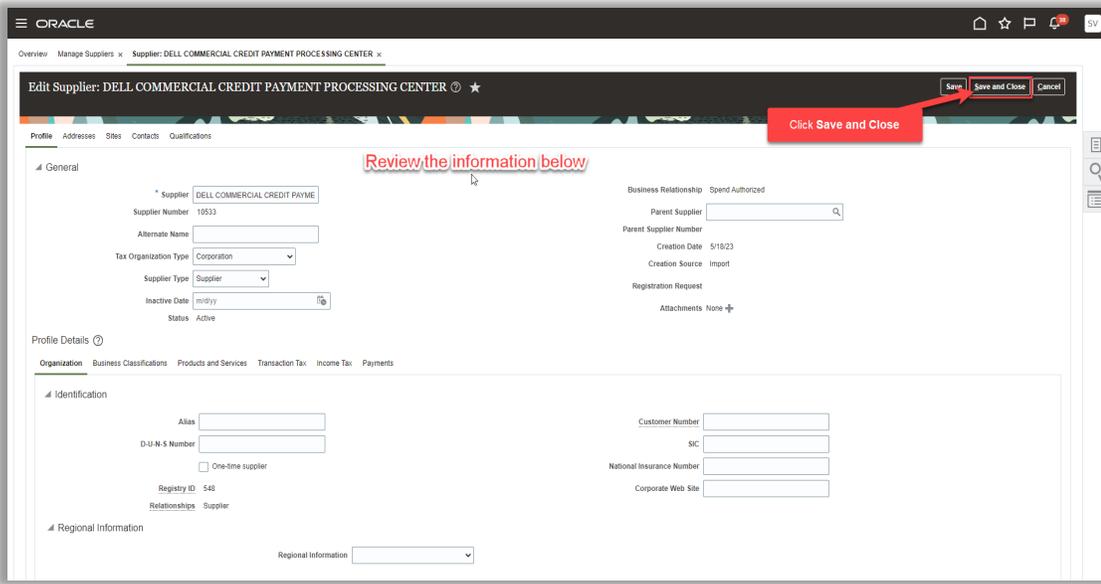
Enter the Supplier Name then click Search



Click the Supplier Name



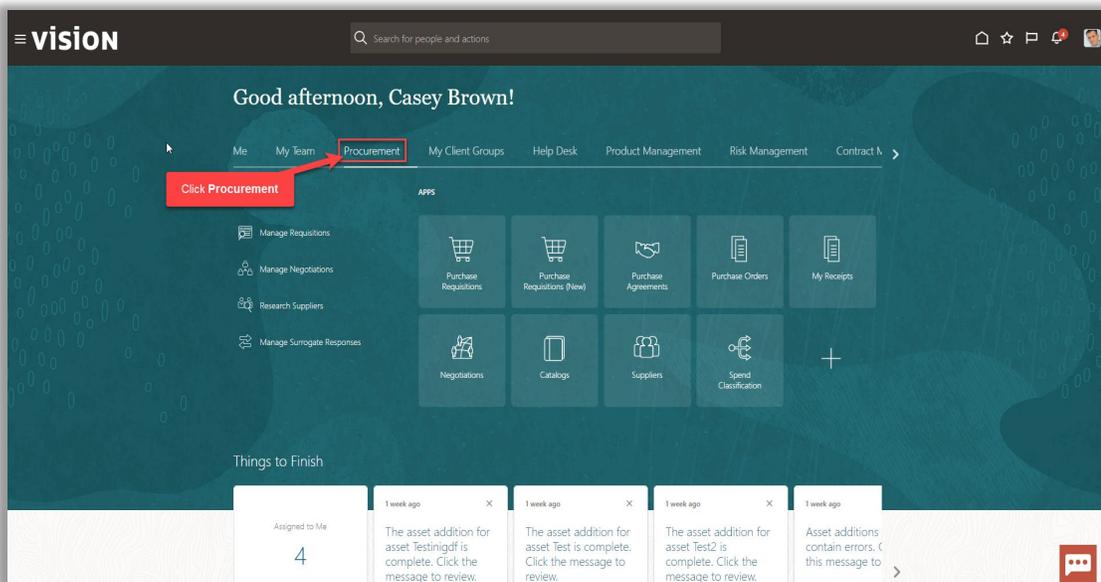
Below we can review or update the **Supplier Information**. If we update any of the information, we must click **Save and Close**



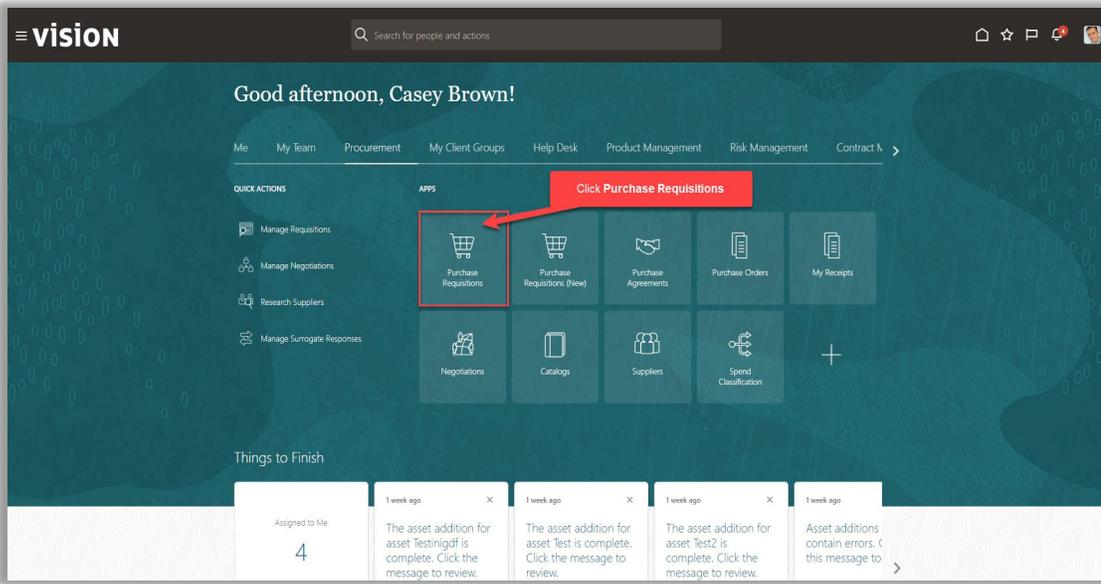
## Duplicate Requisitions

Navigation: Home>Procurement>Purchase Requisitions>View More>Search Requisition>Duplicate>Save and Close

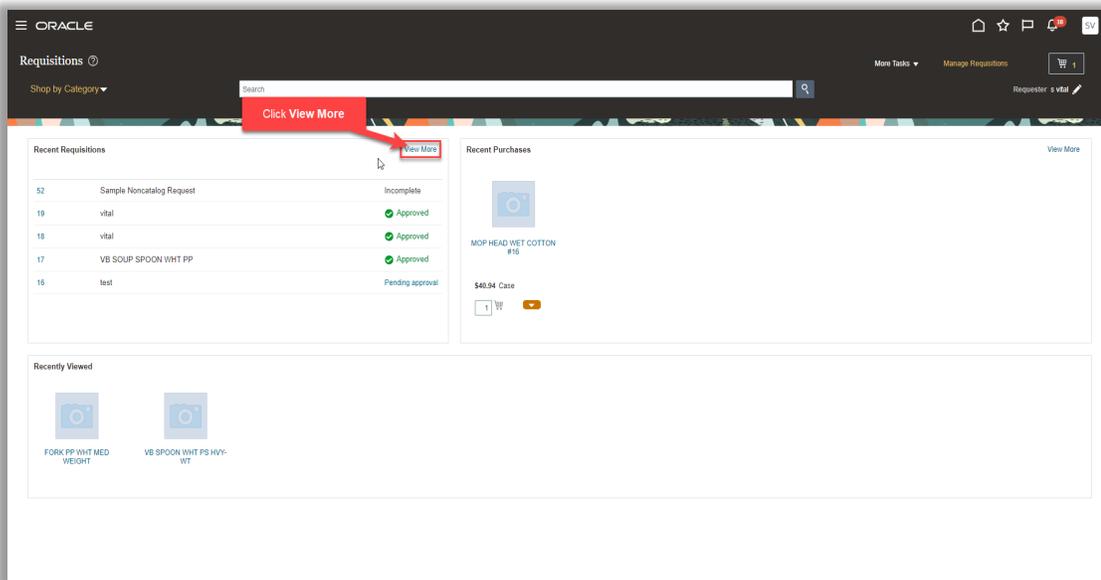
From home screen, click **Procurement**



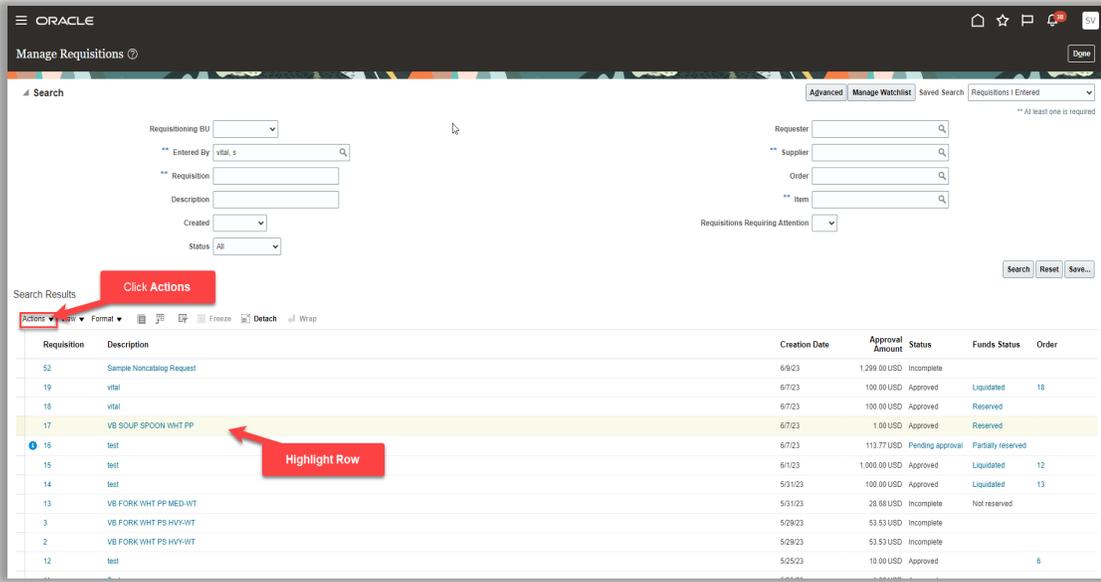
Next, click **Purchase Requisitions**



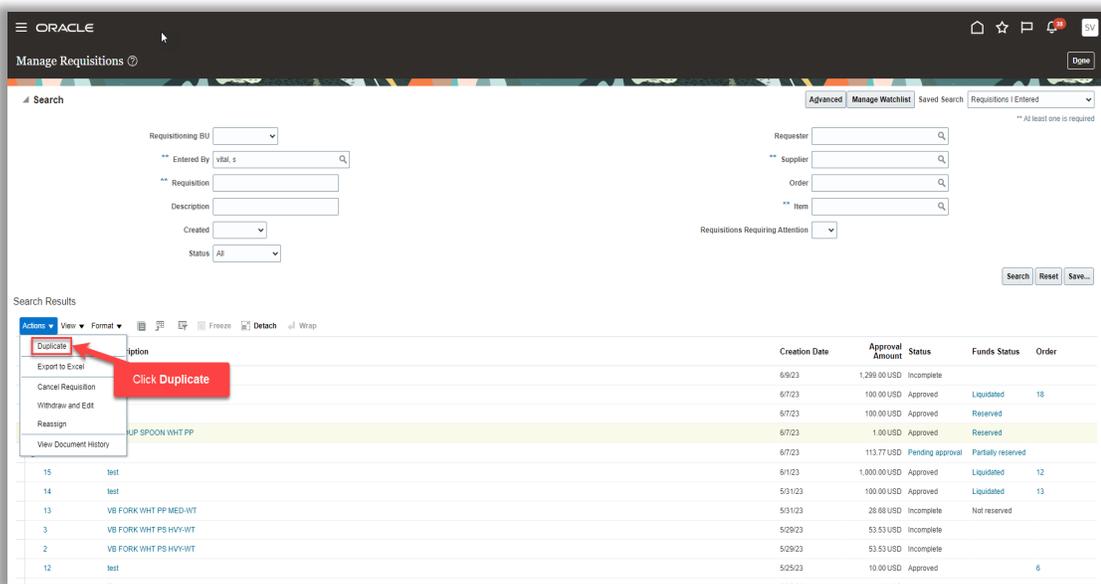
Next, we can enter the Requisition name in the **Search** field or click **View More**



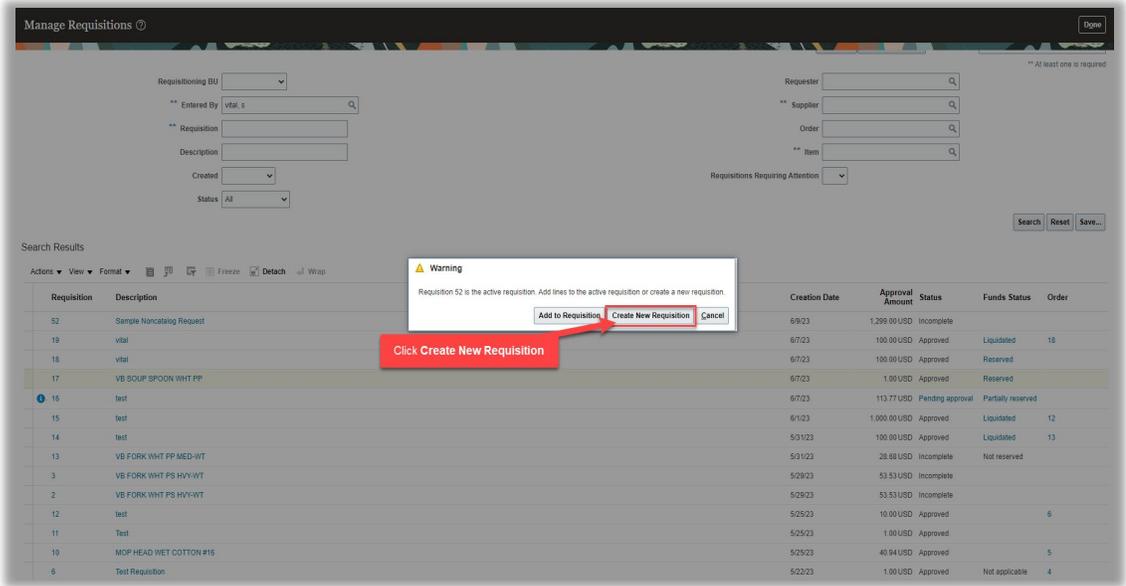
Highlight the row of the requisition we wish to duplicate and click **Actions**



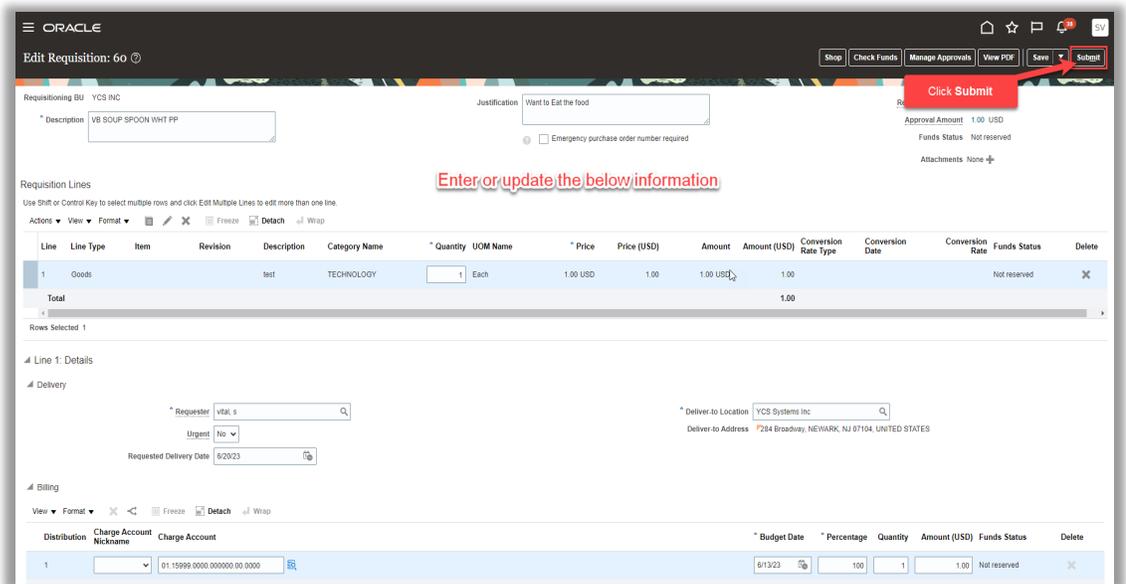
Next, click **Duplicate**



We can either **Add to Requisition** or **Create New Requisition**. Click **Create New Requisition**



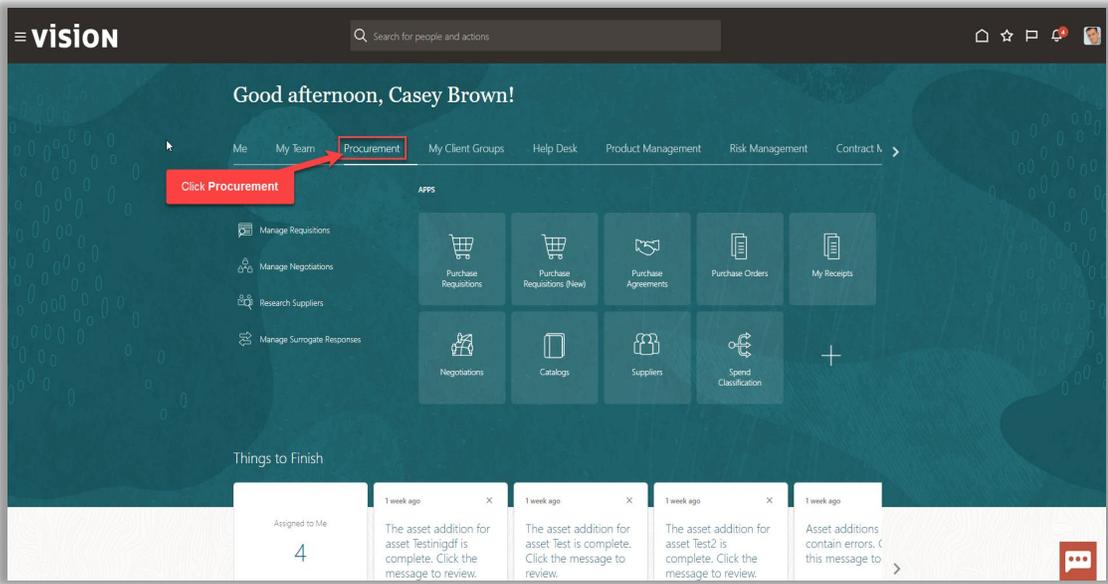
Update or enter the applicable information and click **Submit**



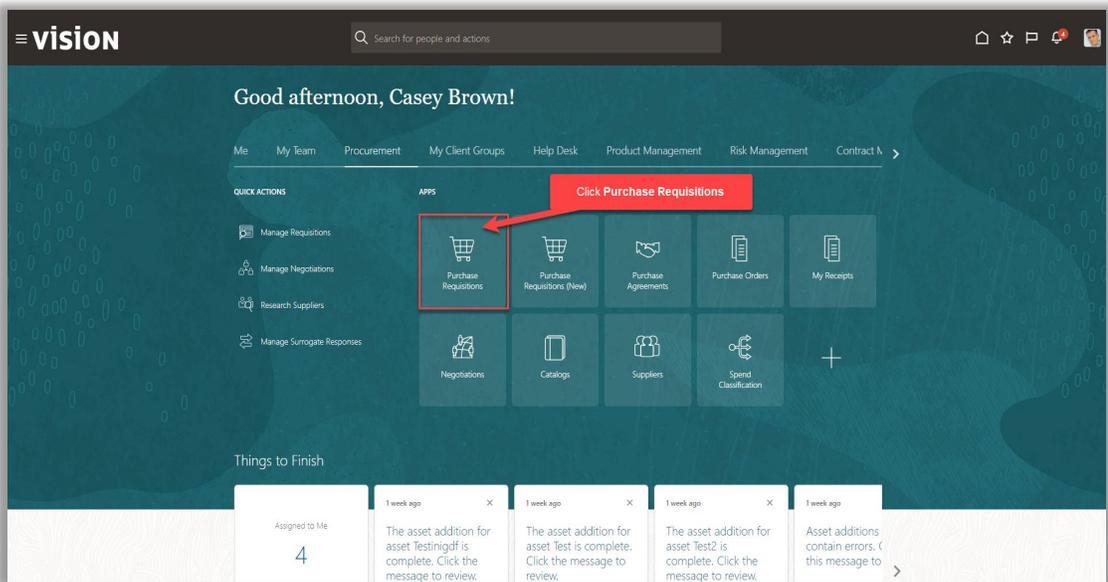
## Create Catalog Requisition

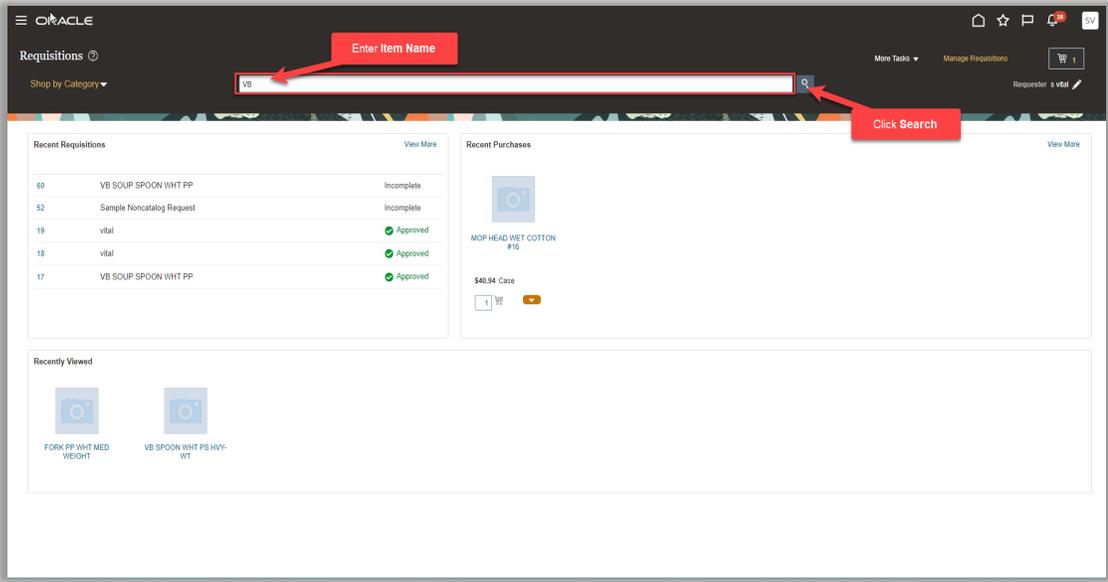
Navigation: Home>Procurement>Purchase Requisitions>Search>Add to Cart>Review>Validate Billing>Check Funds>Submit

From home screen, click **Procurement**

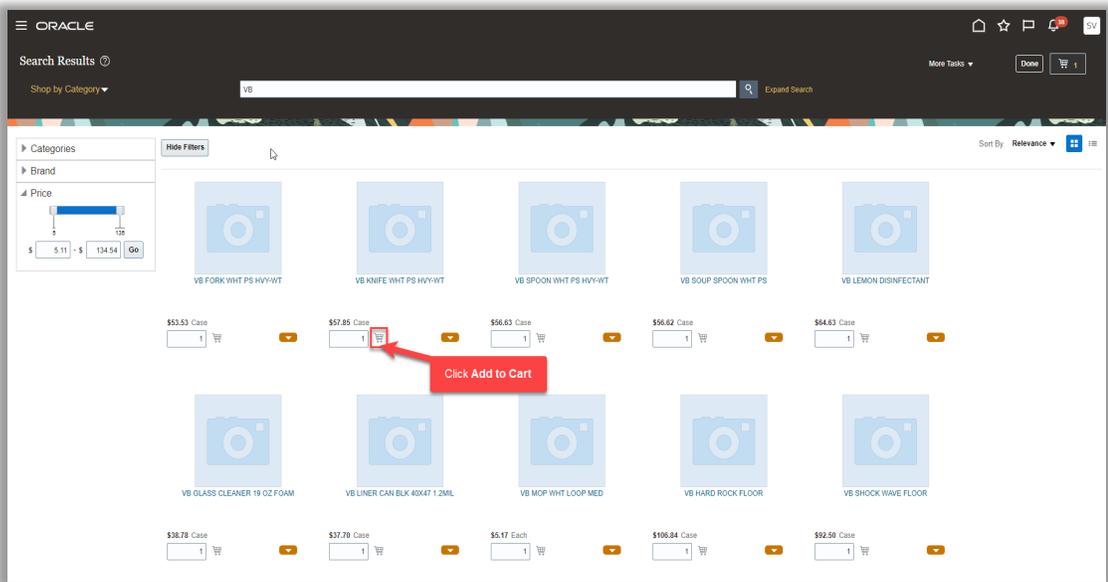


Next, click **Purchase Requisitions**

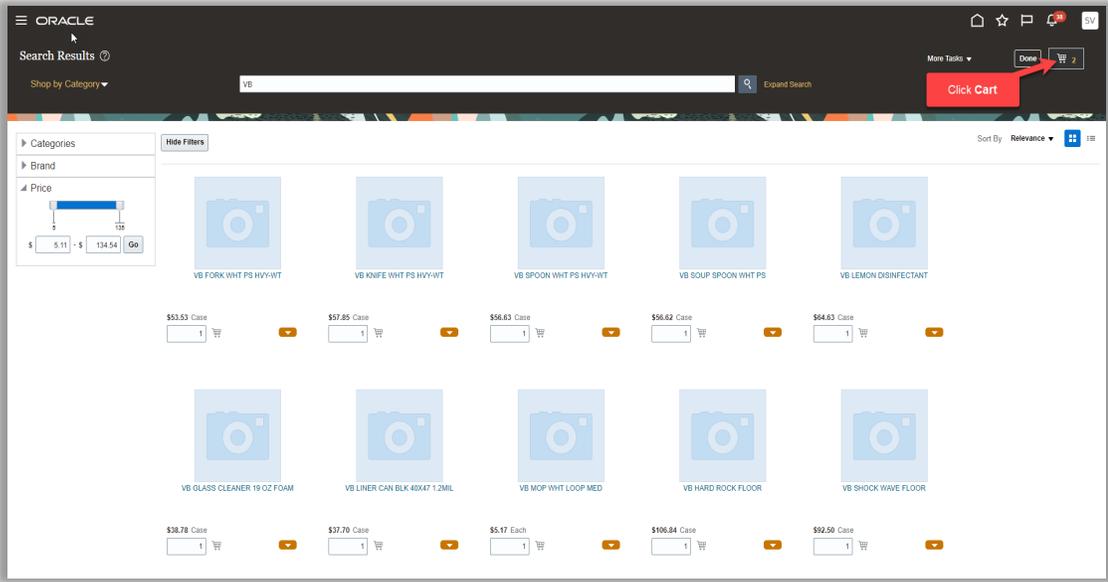




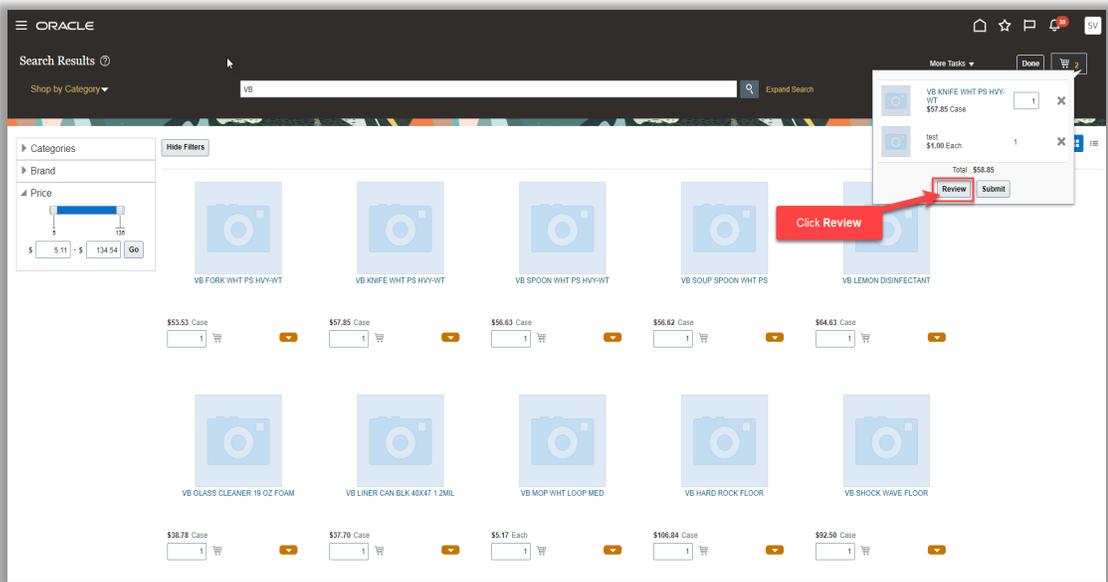
Click **Add to Cart** for the Item



Navigate to the cart



Next, click **Review**



We can **Check Funds**, if applicable. Review the information. Click  and update the **Charge Account**, if needed. Click **Submit**

The screenshot shows the 'Edit Requisition' interface. At the top right, there are buttons for 'Show', 'Check Funds', 'Manage Approvals', 'View PDF', 'Save', and 'Submit'. A red callout box labeled 'Click Check Funds' points to the 'Check Funds' button. Another red callout box labeled 'Click Submit' points to the 'Submit' button. Below the main table, there is a 'Billing' section with a 'Click Search' callout pointing to a search icon in the 'Charge Account' field.

**Requisition Lines**

Line	Line Type	Item	Revision	Description	Category Name	Quantity	UOM Name	Price	Price (USD)	Amount	Amount (USD)	Conversion Rate Type	Conversion Date	Conversion Rate	Funds Status	Delete
1	Goods	test		TECHNOLOGY		1	Each	1.00 USD	1.00	1.00 USD	1.00				Not reserved	✕
2	Goods	PAIK		VB KNIFE VHT PS SUPPLIES		1	Case	\$7.85 USD	\$7.85	\$7.85 USD	\$7.85				Not reserved	✕
<b>Total</b>										58.85						

**Line 1 Details**

**Delivery**

Requester: vial.s  
 Urgent: No  
 Requested Delivery Date: 6/20/23  
 Deliver-to Location: YCS Systems Inc  
 Deliver-to Address: 7284 Broadway, NEWARK, NJ 07104, UNITED STATES

**Billing**

Distribution	Charge Account Nickname	Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
1		01.15999.0000.000000.00.0000	6/13/23	100	1	1.00	Not reserved	✕
<b>Total</b>						1.00		

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at [learn@campratech.com](mailto:learn@campratech.com)

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version

