



# **Procurement Admin Guide**



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Guide Usage and Disclosures	
Guide Information	2
How To Use This Guide	2
Overall Process Flow	2
Glossary of Terms	
Day to Day Operations Guide	4
Create Receipt For Received Items	4
Create Non-Catalog Requisition	6
Create Supplier	
Create Purchase Order	
Create Change Order	
Create Blank Purchase Agreement	
Generate Period End Accruals	
Create Item	
Manage Suppliers	
Duplicate Requisitions	
Create Catalog Requisition	

# 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 <a href="mailto:learn@camptratech.com">learn@camptratech.com</a>.

### 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

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#### **Create Supplier**

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Enter the Create Address Information and click Save and Close

Next, click the **Contacts** tab

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#### Lastly, click the **Qualifications** tab

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#### **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

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Enter the below information and click Create



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

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Procurement BU YCS INC	Supplier Q	* Currency USD 🔻
Requisitioning BU YCS INC	Supplier Site v	Ordered 0.00 USD
Sold-to Legal Entity Youth Consultation Service Inc	Supplier Contact	Total Tax: 0.00 USD
Order 26	Communication Method None	Total 0.00 USD
Status Incomplete		Procurement Card
* Buyer vital, s		Description
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Click Schedules tab

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#### Select Requested Delivery Date and click Submit

			Click Submit
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#### Create Change Order

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

From home screen, click **Procurement** 

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#### Next, click Purchase Orders

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Update the applicable information and click Submit

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#### Create Blank Purchase Agreement

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

From home screen, click **Procurement** 

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Next, click Purchase Orders

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# Click Create Agreement

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Enter the Create Agreement details and click Create

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

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#### Click Add Row

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

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#### Generate Period End Accruals

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

From home screen, click **Tools** 

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Next, click Scheduled Processes

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#### Click Schedule New Process

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From the dropdown, click **Search** 

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# Enter Transfer Transactions from Receiving to Costing and click Search

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Highlight the row and click  ${\bf O}{\bf K}$ 

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#### Click **OK**

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

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#### Click **OK**

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#### Click Refresh

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ESS process to check Search Cloud Service availability	5550926	Wait	6/12/23 8:17 PM UTC	6/12/23 8:13 PM UTC
Rebuild Learning Item Stop Word Index	5550925	Wait	6/12/23 8:15 PM UTC	6/12/23 8:10 PM UTC
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Once Succeeded, highlight the row to view the **Process Details**. Click the **Output** to view the Report results

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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** 

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Click Tasks

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#### Click Create Item

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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** 

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

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Next, click **Specifications** tab

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## Click Associations tab

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#### Manage Suppliers

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

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#### **Duplicate Requisitions**

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

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Next, click **Review** 



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

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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 <u>learn@camptratech.com</u>

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

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