



# Oracle R12 E-Business Suite Training

**iProcurement**

# Oracle R12 iProcurement

## Table of Contents

<b>Set User Profiles</b>	<b>1.1</b>
<b>Create and Submit a Requisition</b>	<b>2.1</b>
<b>Approve Notifications</b>	<b>3.1</b>
<b>Reassign Notification Approvals</b>	<b>4.1</b>
<b>Change and Resubmit a Requisition or Cancel</b>	<b>5.1</b>
<b>Payment Inquiry</b>	<b>6.1</b>





# Oracle User Procedure

## **Title:**

*Set User Profiles*

## **Description:**

*This procedure may be used by all Internet Procurement users to default values into their own requisitions using Internet Procurement...*

## **Oracle Prerequisites:**

- *You must have a profile setup in Oracle Applications.*
- *You must have the responsibility of Internet Procurement.*

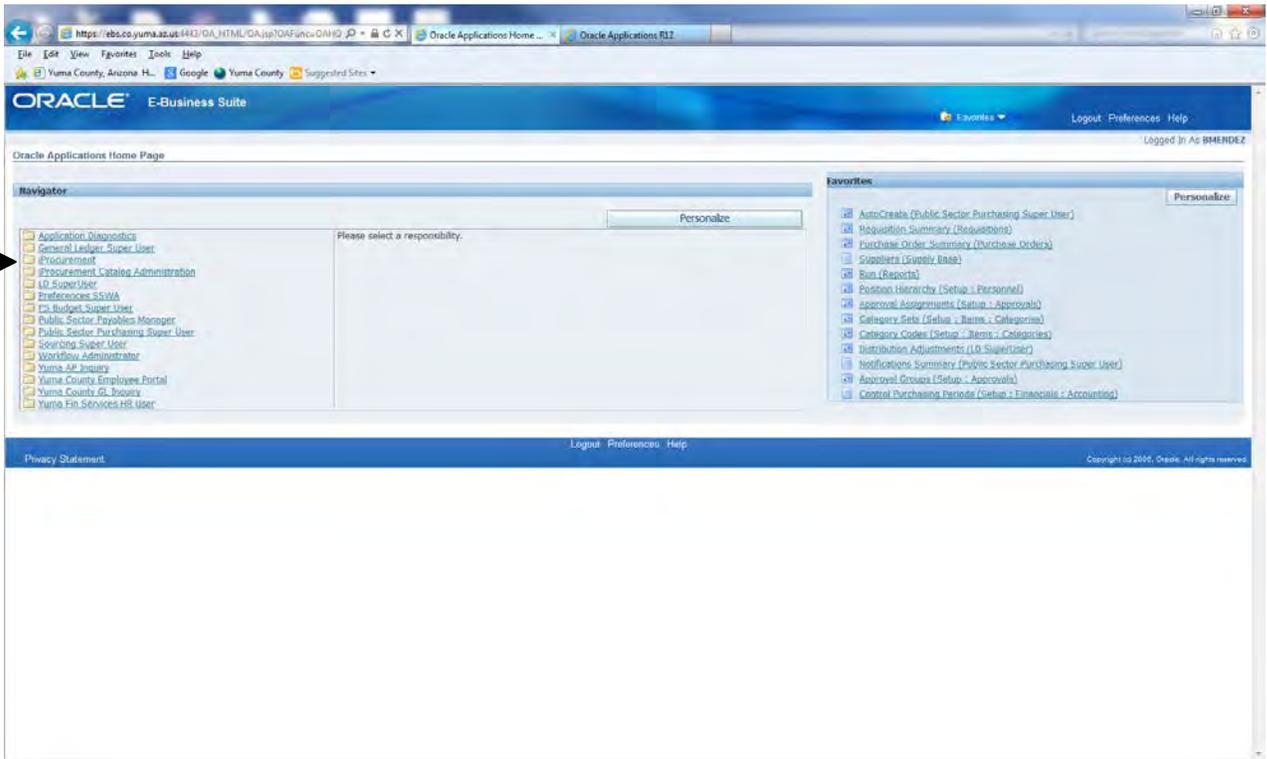
## **Oracle Responsibility:**

*Internet Procurement*

<b><i>Menu Path</i></b>
ORACLE HOME PAGE ➤ NAVIGATOR ➤ INTERNET PROCUREMENT HOME PAGE

**Window Name:**

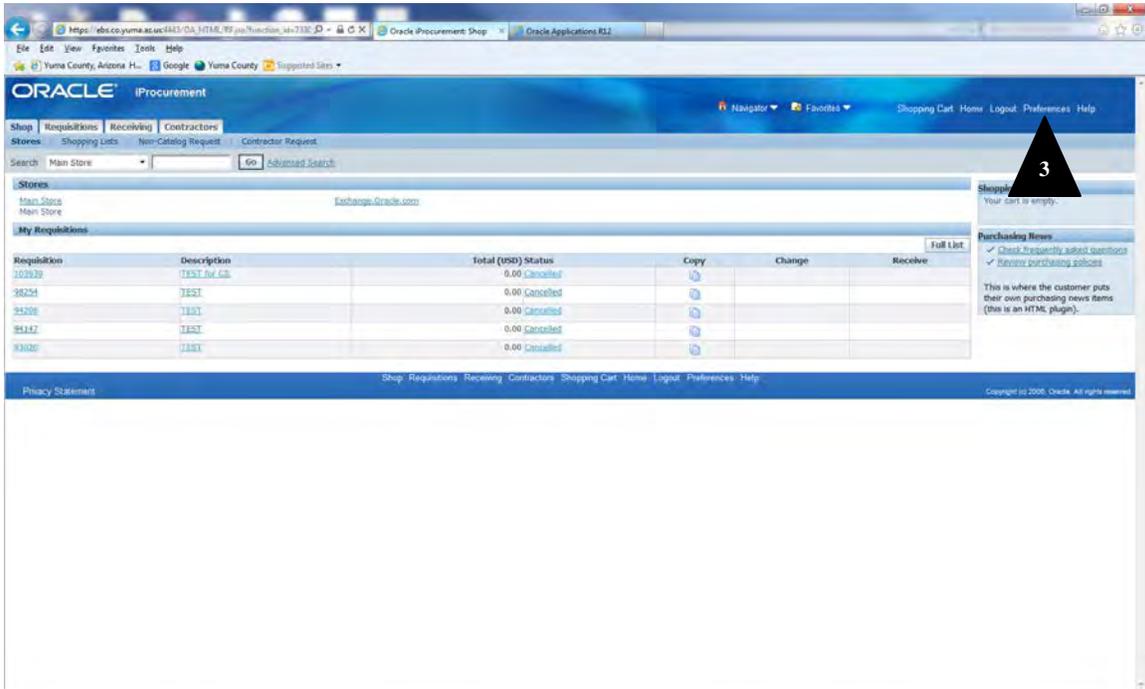
**Personal Home Page – Main Menu**



Field Name	Description/Action
1. NAVIGATOR	In the <i>Navigator</i> section, select the <b>‘Internet Procurement’</b> hyperlink to enter the <i>iProcurement</i> Home Page



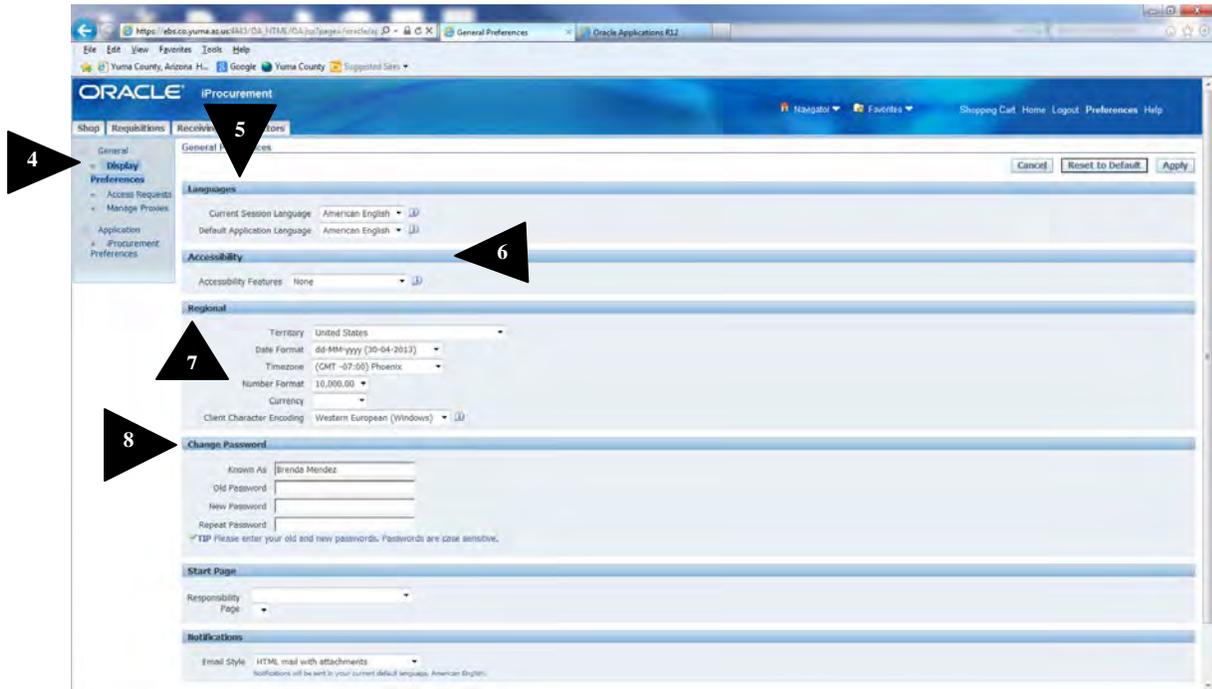
**Window Name:**  
iProcurement Home Page



**Field Name            Description/Action**

**3. Select *Preferences*.**

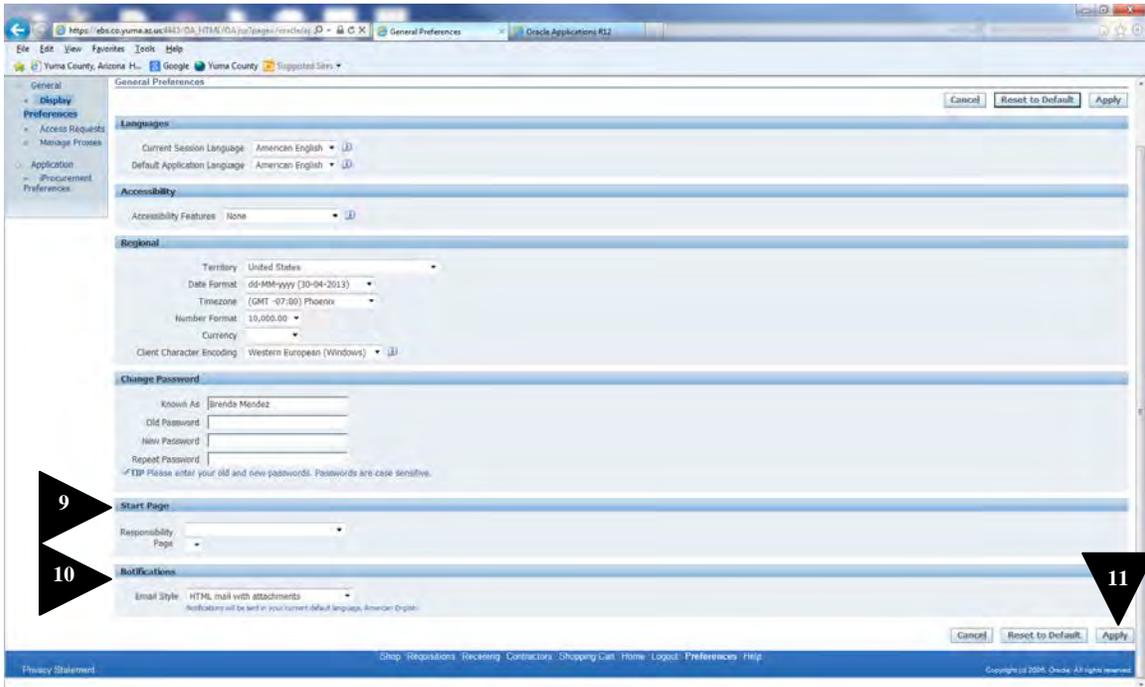
**Window Name:**  
**Preferences**



Field Name	Description/Action
<b>4. GENERAL</b>	Display Preferences – See Default Settings. Access Requests – Oracle Responsibilities (in order to request a responsibility, contact <i>ITS Helpdesk</i> )
<b>5. LANGUAGES</b>	Default Settings.
<b>6. ACCESSIBILITY</b>	Default Settings.
<b>7. REGIONAL</b>	Select Default Territory, Date Format, Timezone, Number Format, Currency, and Default Client Character Encoding.
<b>8. CHANGE PASSWORD</b>	Default Name, Old Password, New Password, Repeat Password

**Window Name:**

### Preferences



**9. START PAGE**

Responsibility - Default Settings (Select preferred start page when logging into Oracle).

**10. NOTIFICATION**

Email Style - Select Preference

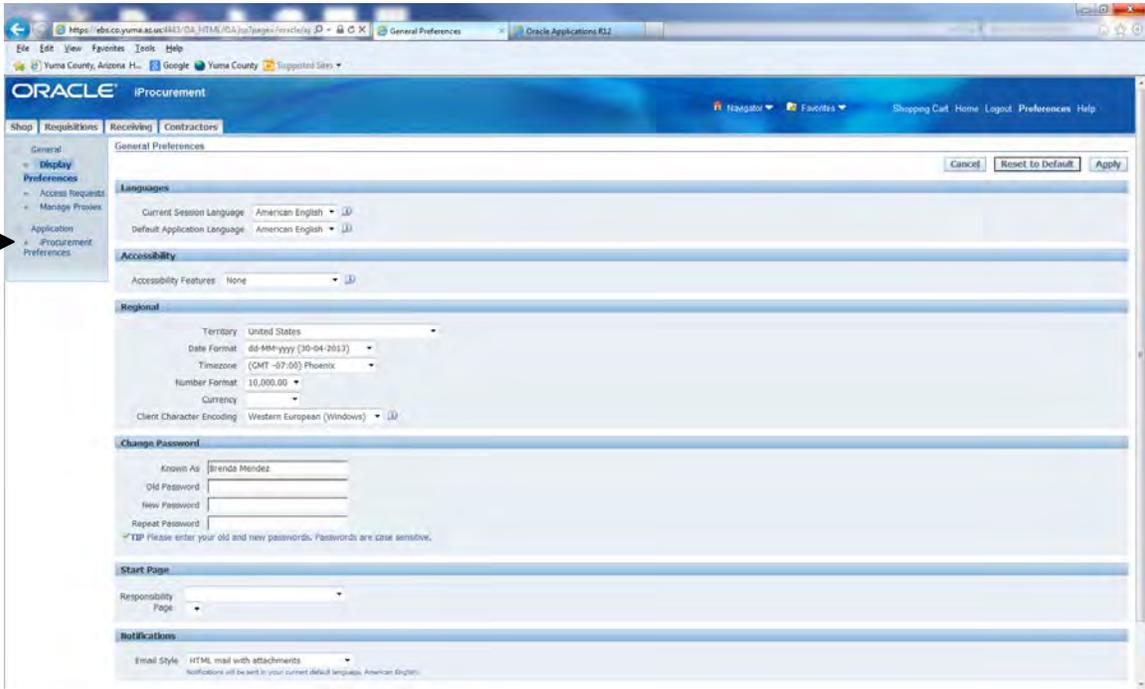
**11. APPLY**

Click *Apply* to receive confirmation of changes made.

**Window Name:**

Preferences

12



**Field Name**

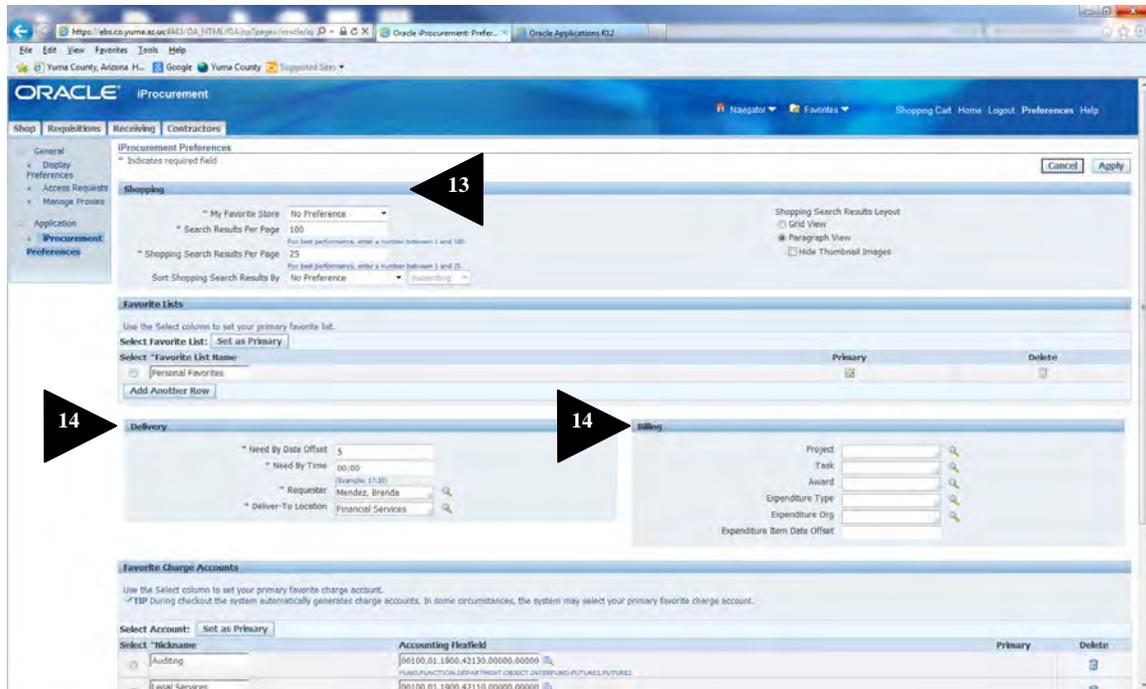
**Description/Action**

**12. IPROCUREMENT PREFERENCES**

Click on **IPROCUREMENT PREFERENCES**.

**Window Name:**

Preferences



**13. SHOPPING**

Default My favorite Store - Exchange.Oracle.com

**Search Results Per Page** - Enter the default number of records you want returned from searches in Search Results, View Orders, or Receiving Pages.

**14. DELIVERY**

**Need-By Date** – Enter the number of days that will be added to The Order Date to Default as the Need-By-Date.

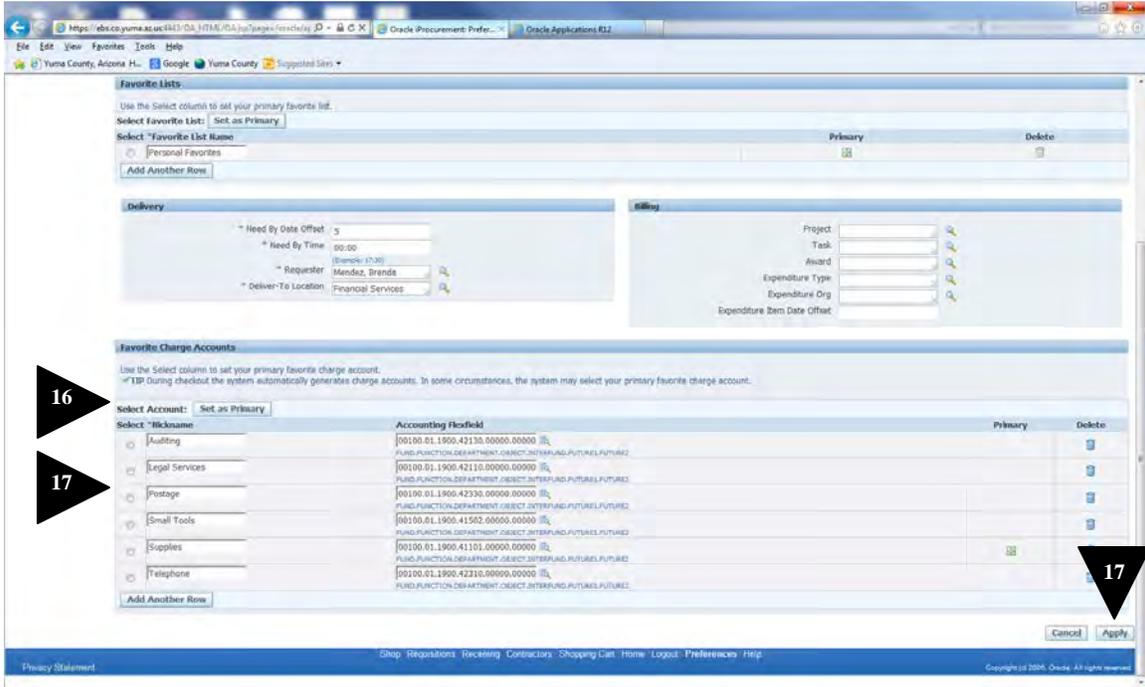
**Requester Name** - Enter the default Requestors Name.

**Deliver-To Location** - Enter the default Deliver-To Location.

**15. BILLING**

This Default information will be on every Requisition that is created. *(Not Recommended for you to enter any information here).*

**Window Name:**  
**Preferences**



**Field Name**                      **Description/Action**

**16.** Enter the Account Distribution combinations that you use frequently.

*Note: Select a Default and will automatically roll into all requisitions.*

**17.** Enter a Nickname for your frequently used Account Distribution Combinations.

**18. ADD ANOTHER ROW**                      Click on **ADD ANOTHER ROW** to add more favorite distribution account combinations as needed.

**19. APPLY CHANGES**                      Select Apply Changes to receive Confirmation.

*Note: Many of the Preference settings are the same as user profiles in the Core Oracle Applications.*



*End of procedure*



# Oracle User Procedure

## Title:

*Create and Submit a Requisition using the Step-by-Step Checkout*

## Description:

*This procedure may be used by all requestors to create and submit a requisition for approval. There are several ways to find products on the iProcurement Home Page. This procedure will demonstrate how to use Non-Catalog Request to create a Requisition. The Step-By-Step checkout process will also be used. The Step-by-Step Checkout process is the lengthiest checkout process because it gives the Requisitioner options for many decisions and special shipping and delivery situations. The Express Checkout is the more streamlined method to checkout. Express Checkout uses default setting from your profile to complete many fields.*

## Oracle Prerequisites:

- *None*

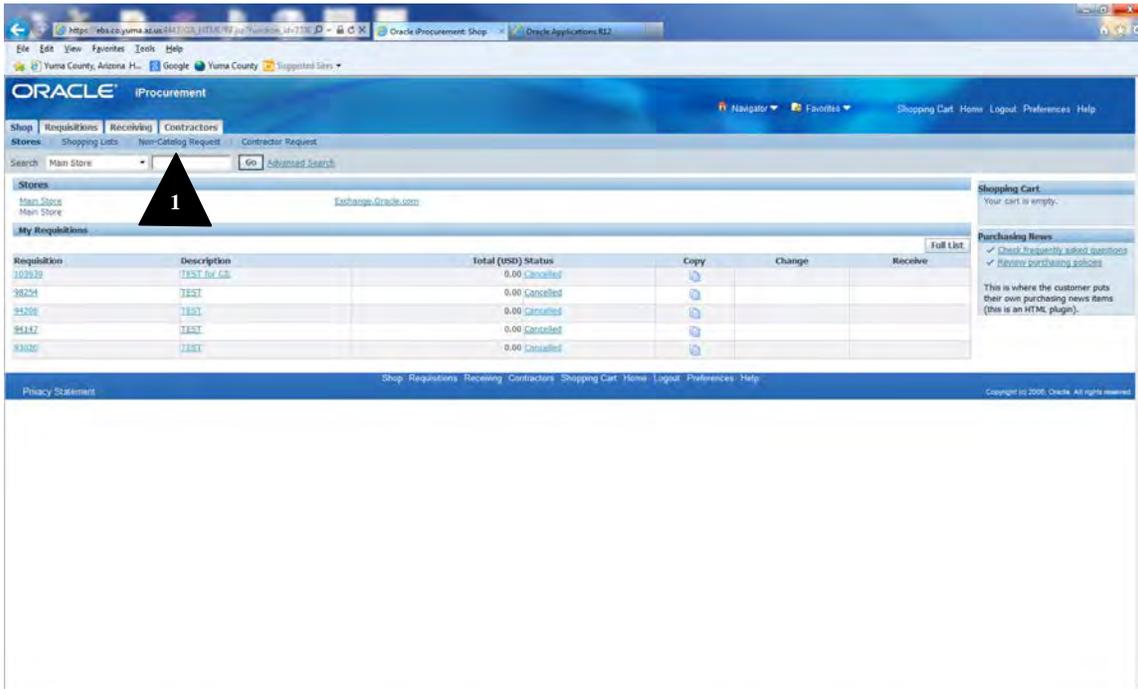
## Oracle Responsibility:

- All iProcurement Users

### ***Menu Path***

ORACLE HOME PAGE ➤ APPS LOGON LINKS ➤ INTERNET PROCUREMENT

**Window Name:**  
iProcurement Home Page



**Field Name**

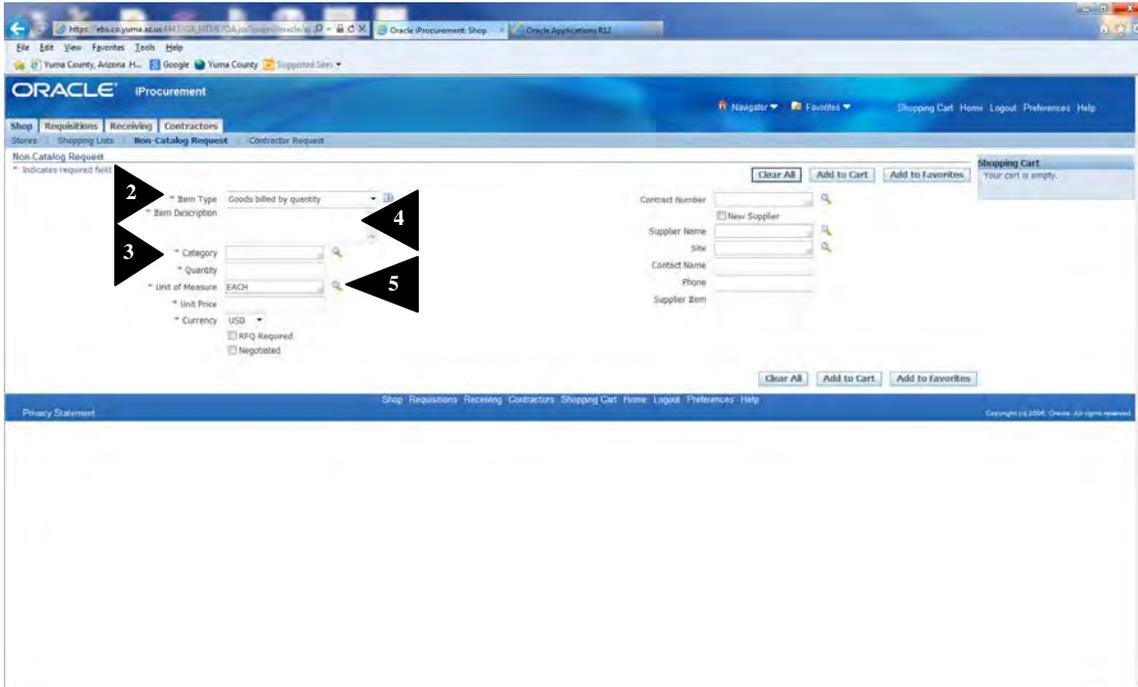
**Description/Action**

**1. NON-CATALOG REQUEST**

Click on *Create a Non-Catalog Request*.

*Note: Categories are maintained by the Finance Department. Shopping List is your personal list of frequently requested items that you maintain. These are items that remain at a set price or don't change on amount frequently.*

**Window Name:**  
**Non-Catalog Request**

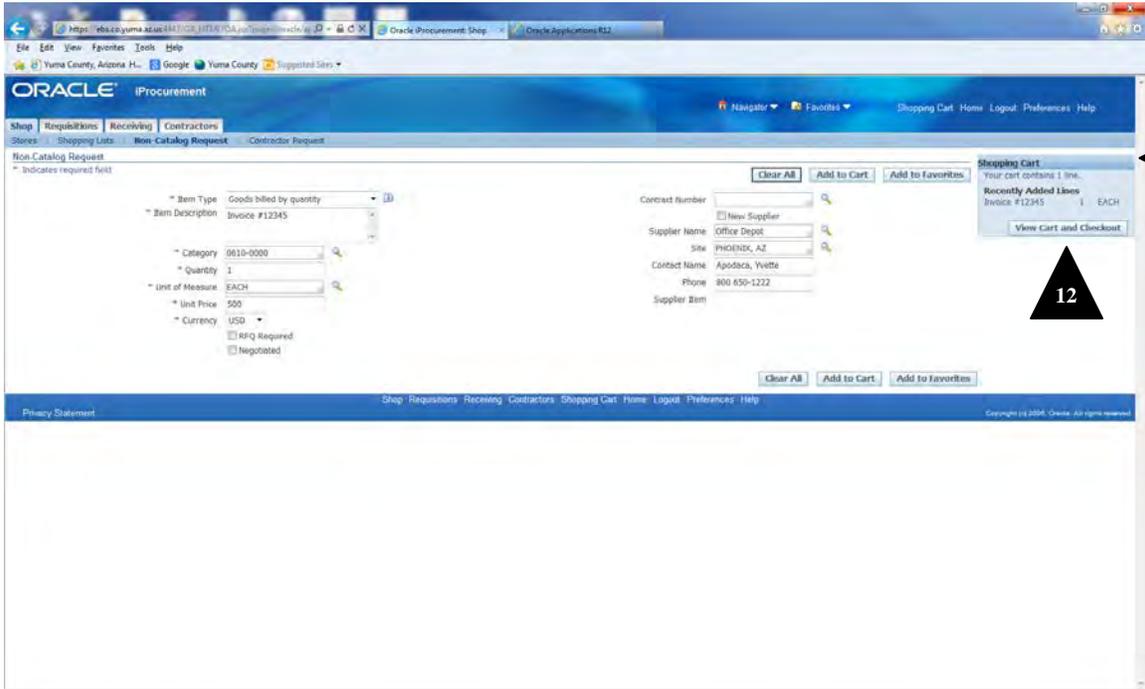


Field Name	Description/Action
<b>2. ITEM TYPE</b>	Select item Type Service billed by quantity Goods or service billed as an amount
<b>3. ITEM DESCRIPTION</b>	Enter invoice information or Open Purchase Description See Note below:
<b>4. CATEGORY</b>	Use search engine to search for proper category
<b>5. UNIT OF MEASURE</b>	Default settings.

**Note:** *The information entered in the Item description can not be duplicated if you have more than one invoice. Also the description will print out on Open Purchase Orders and also on some reports from General Ledger inquiry.*



**Window Name:**  
Shopping Cart



**Field Name**

**Description/Action**

**11. SHOPPING CART**

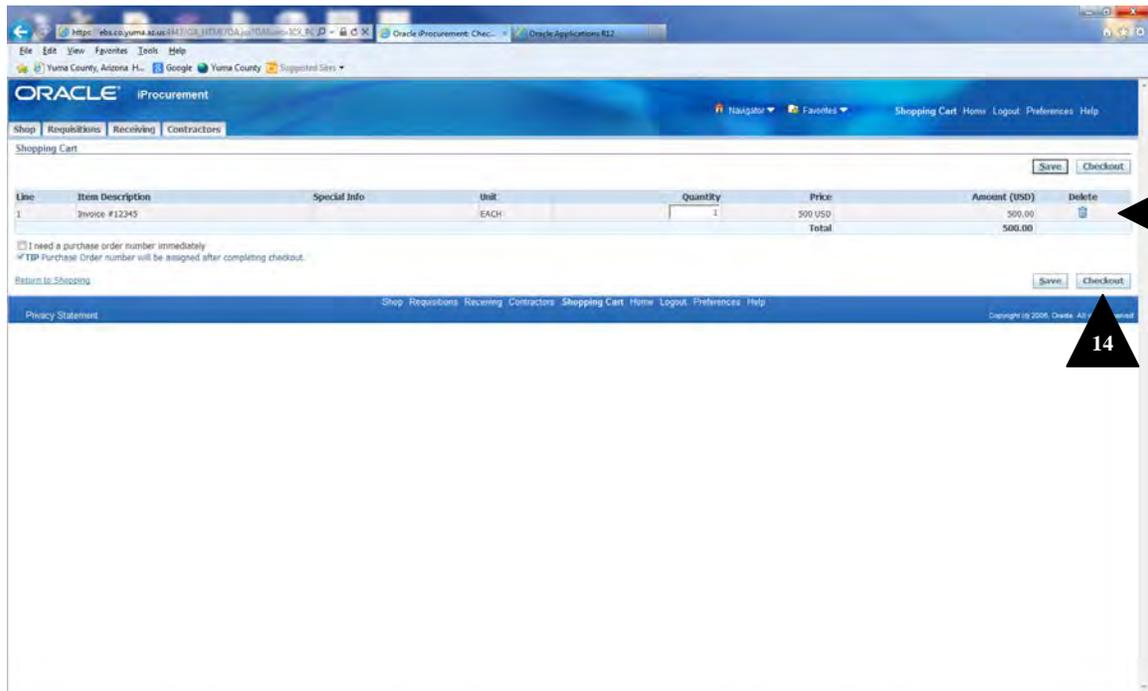
One Item was added to your Shopping Cart. Add more line or Proceed to Checkout.

**12. VIEW CART AND CHECKO**

Click on View Cart and Checkout to see your list of Items added.

 **Note:** Add all lines needed in this section.

Window Name:  
Shopping Cart



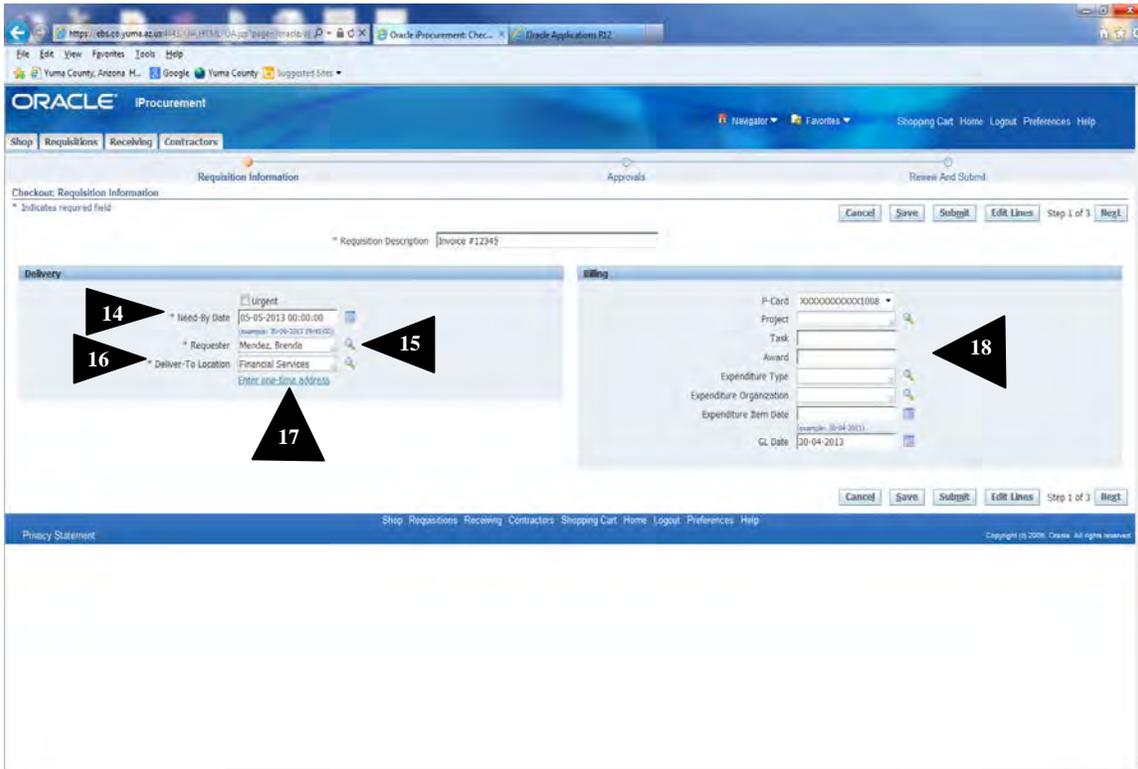
**Field Name**      **Description/Action**

**13. DELETE**      Click on the DELETE icon (trash can) to delete any unwanted items from the shopping cart

**14.CHECKOUT**      Click on **PROCEED TO CHECKOUT** to enter the checkout process

**Window Name:**

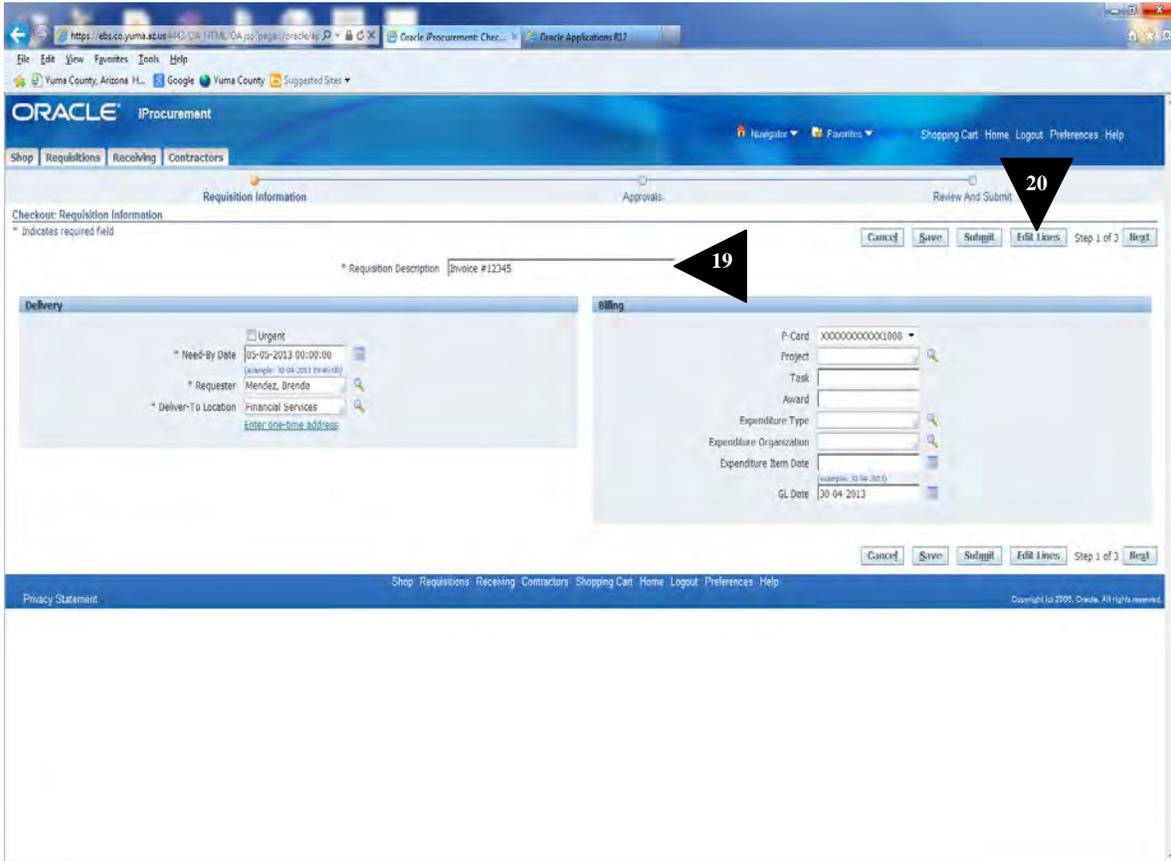
**Checkout**



*Step-By-Step Checkout gives you the opportunity to select different values for the above information. If profile options have been defined and no changes will be made to the default values, Express Checkout should be used.*

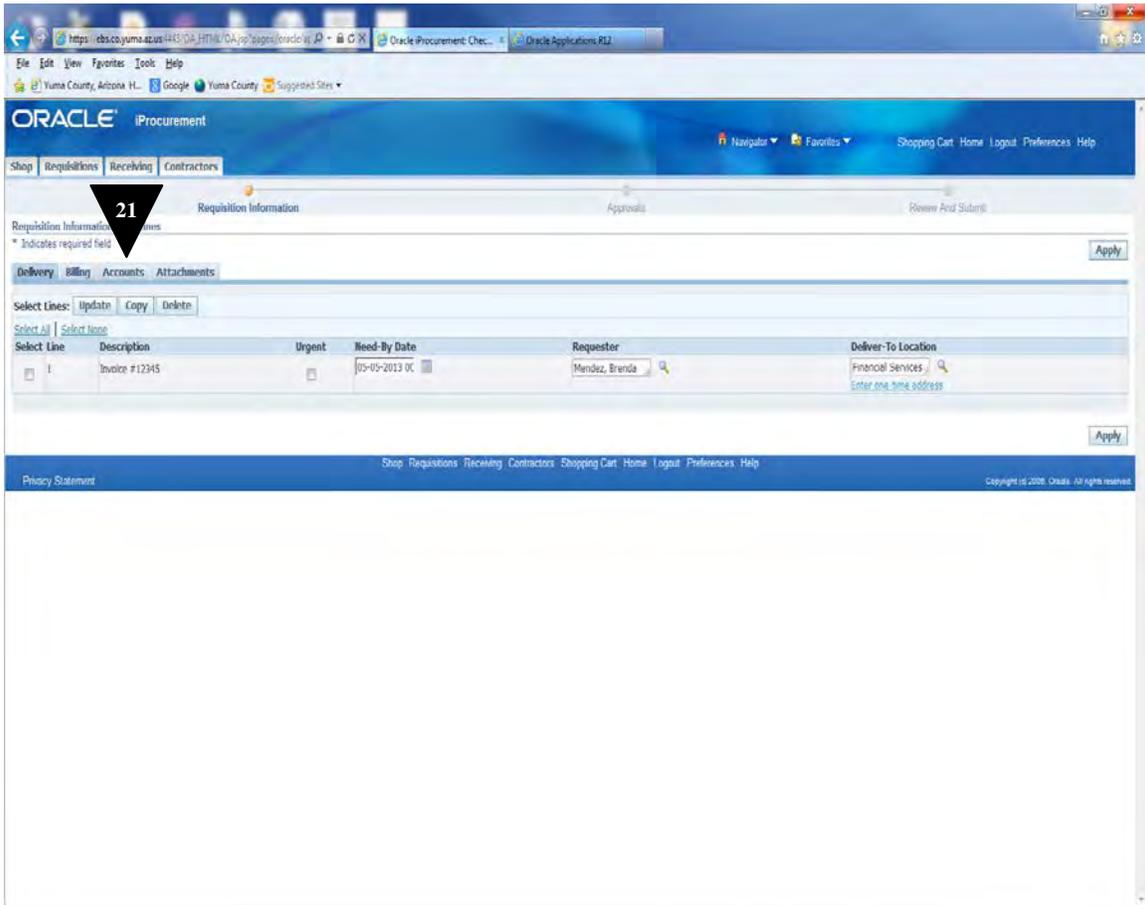
Field Name	Description/Action
<b>14. NEED-BY DATE</b>	Enter the Need-by Date. This date will default from your Profile
<b>15. REQUESTOR</b>	Select the Requestor if different from yourself. The requestor will default from your profile
<b>16. DELIVER-TO LOCATION</b>	Enter the Deliver-To Location. The location will default from your profile
<b>17.</b>	Enter a one-time address if these items will be delivered to an address to be used only for this order, which is not already defined in Purchasing
<b>18. PROJECT INFO</b>	Enter project information if applicable to a Project in the Oracle Project Accounting application

**Window Name:**  
**Checkout**



- | <b>Field Name</b>      | <b>Description/Action</b>         |
|------------------------|-----------------------------------|
| <b>19. DESCRIPTION</b> | Every descriptions must be unique |
| <b>20. EDIT LINES</b>  | Click on EDIT LINES to proceed.   |

**Window Name:**  
Checkout



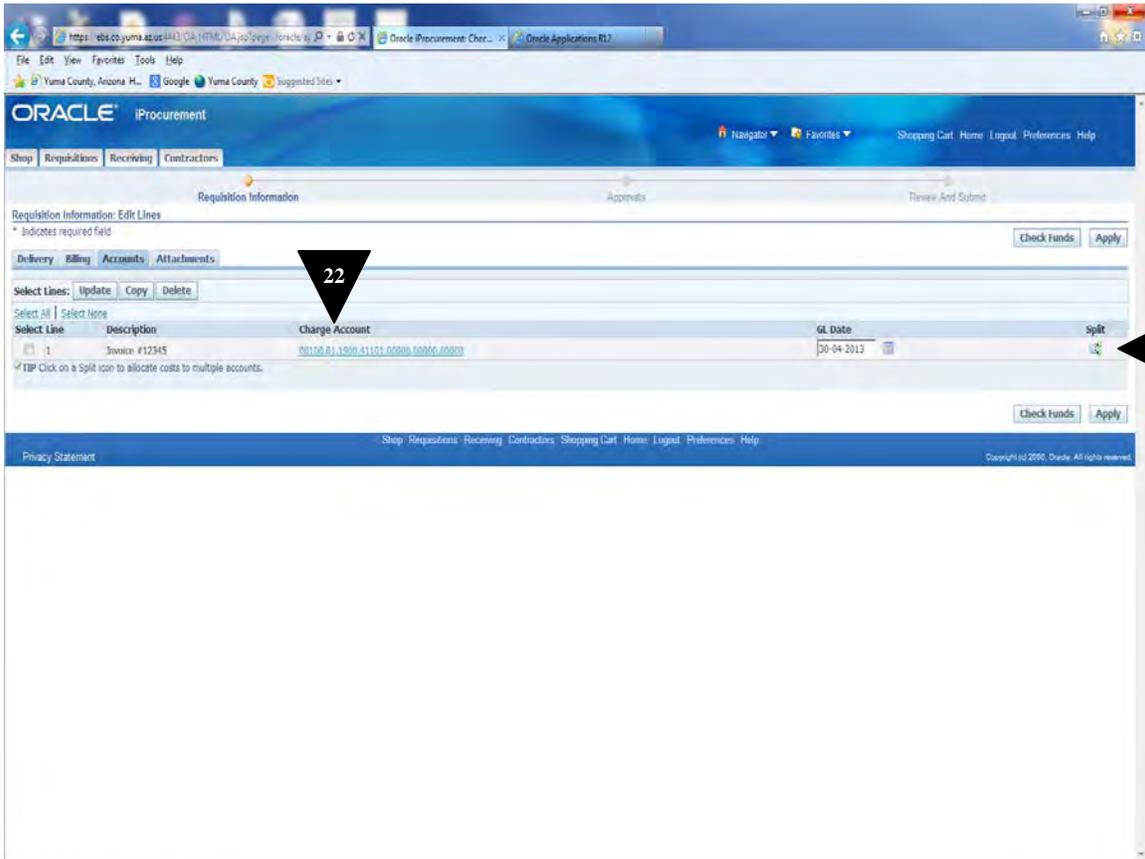
**Field Name**

**Description/Action**

**21. ACCOUNTS**

Click on the ACCOUNTS hyperlink to edit the charge account or to add multiple charge accounts to an item

**Window Name:**  
Checkout

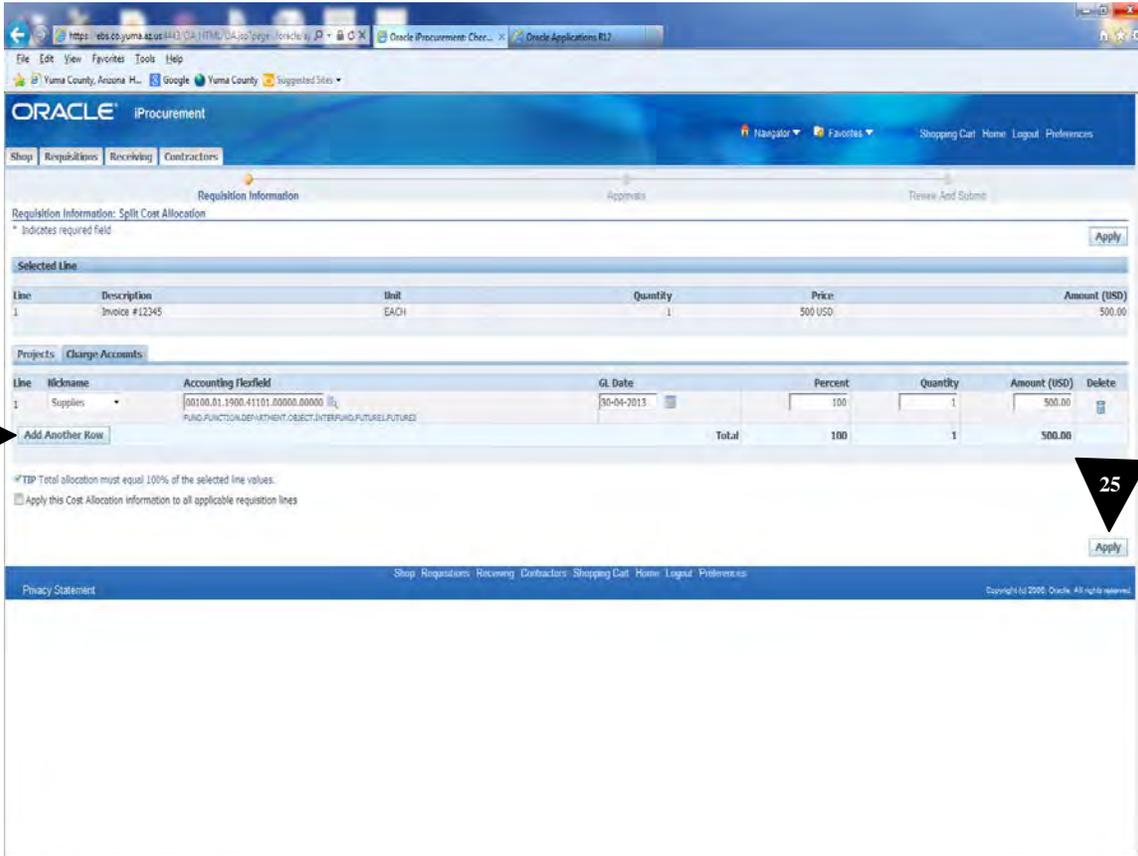


**Field Name      Description/Action**

**22. CHARGE ACCOUNT**      Click on Charge account to make necessary changes

**23.**      Click on the **SPLIT** to split the selected item to multiple charge accounts. If selected, you will be prompted for multiple accounts.

**Window Name:**  
Checkout



**Field Name**

**Description/Action**

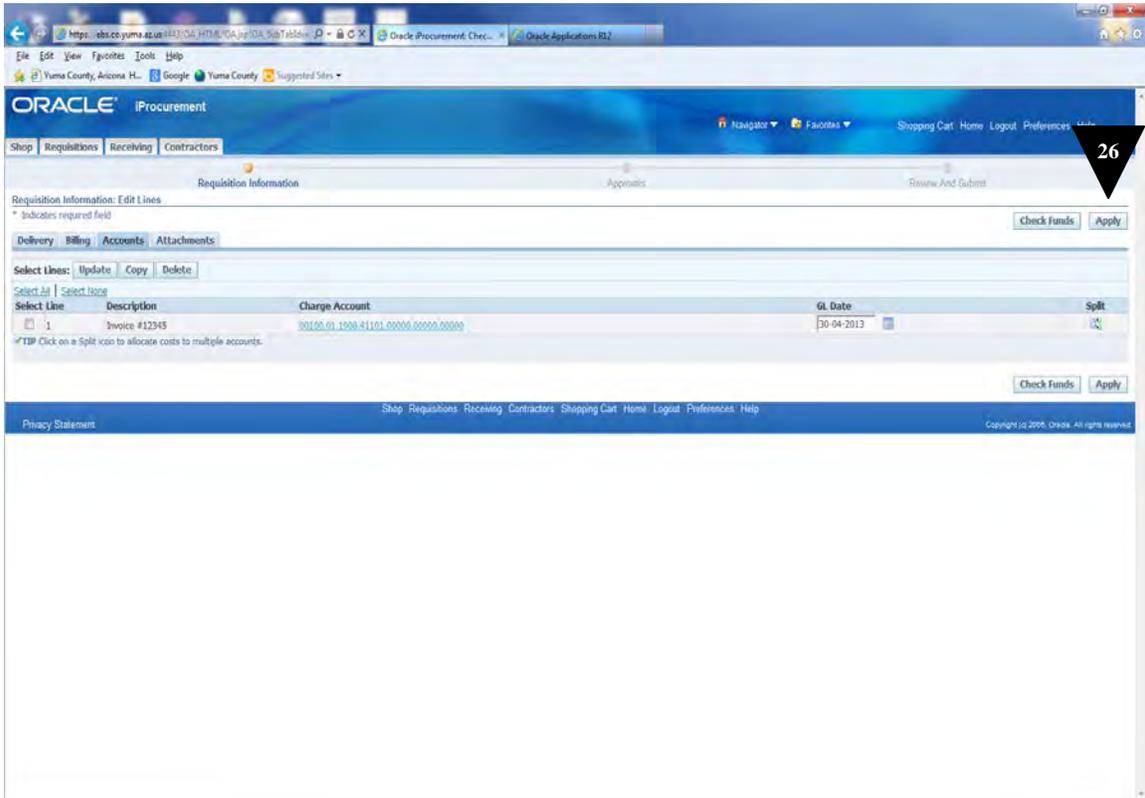
**24. ADD ANOTHER ROW**

Click on **ADD ANOTHER ROW**  
To add more lines.

**25. APPLY**

Click on APPLY button to Proceed with Checkout.

**Window Name:**  
Checkout



**Field Name**

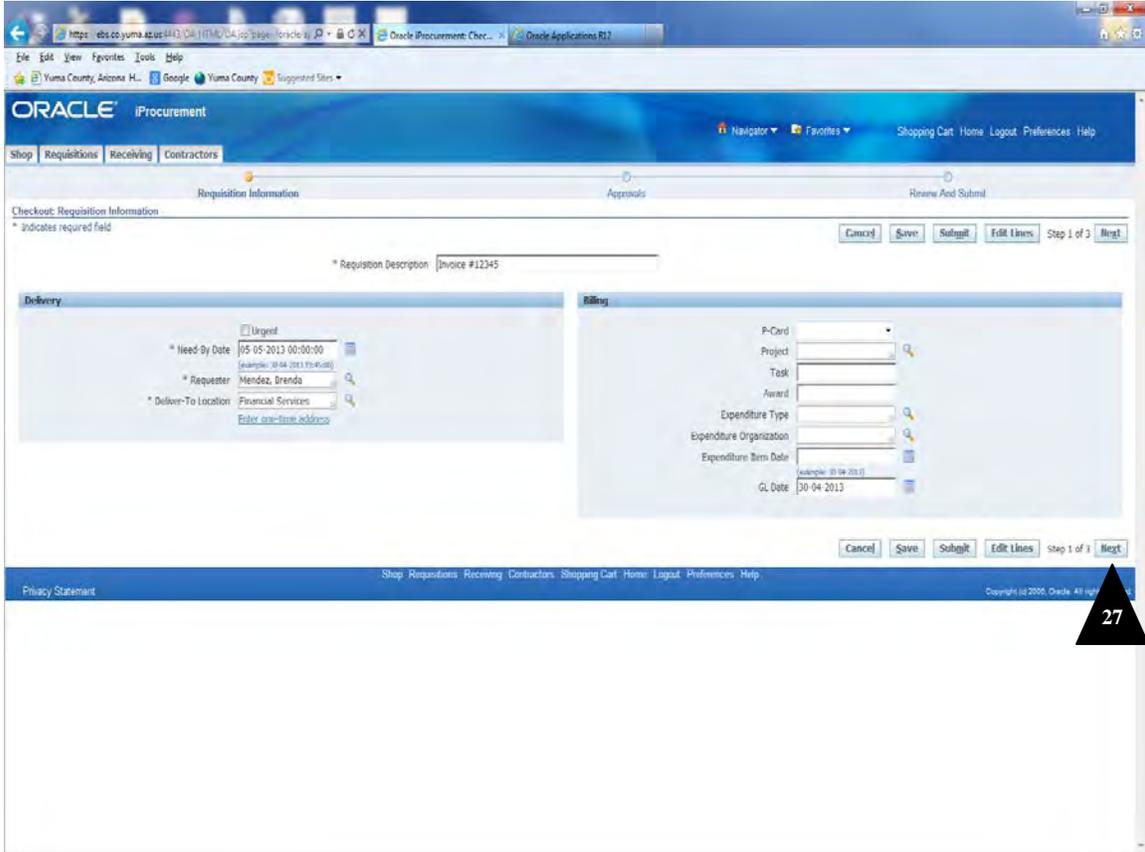
**Description/Action**

**26. APPLY**

Click on Apply

**Window Name:**

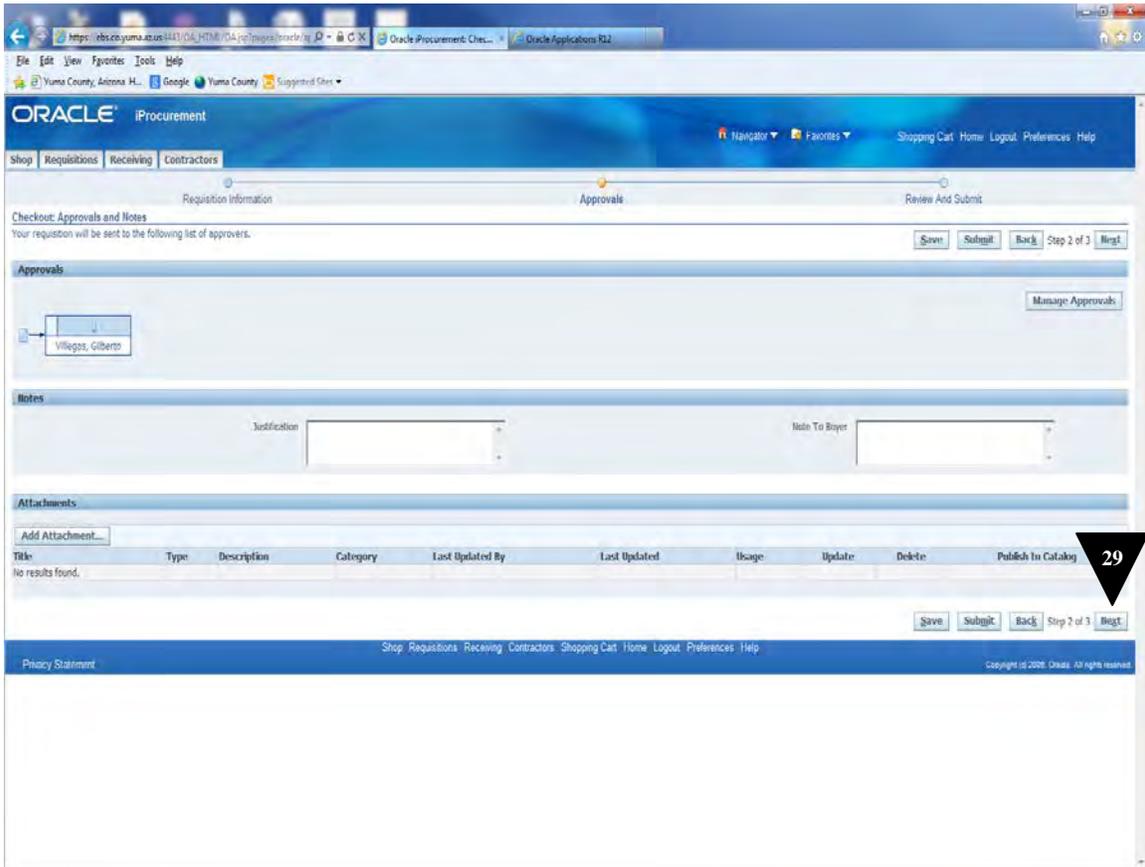
Checkout



**Field Name            Description/Action**

**27.**    Click on NEXT to proceed.

**Window Name:**  
Checkout



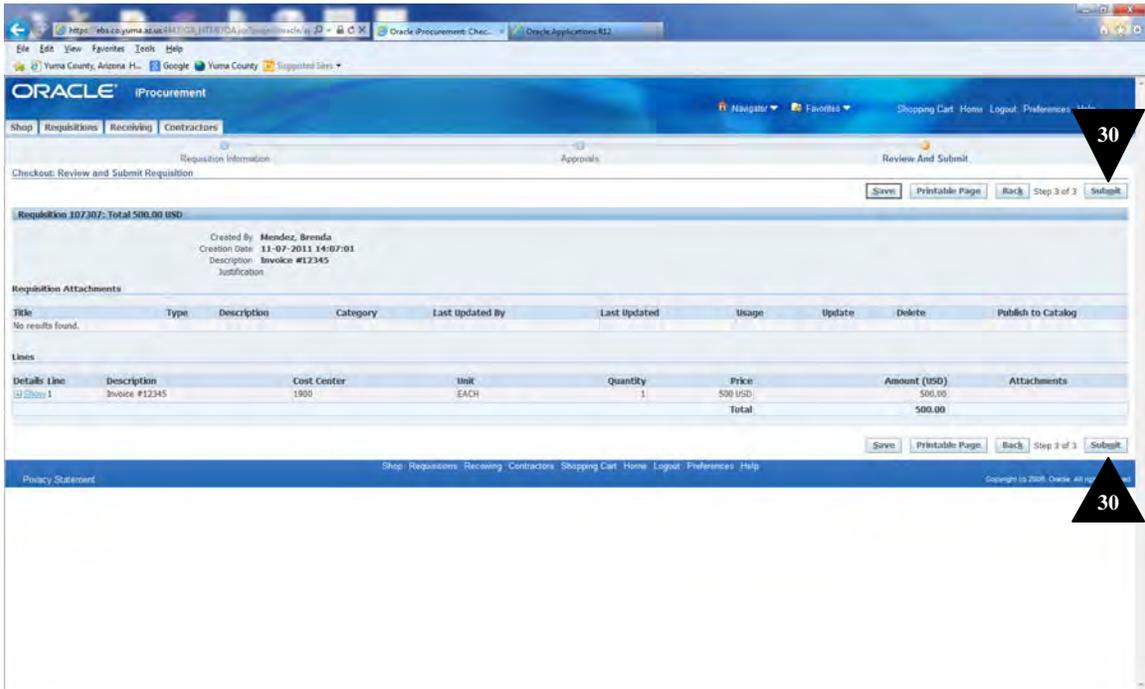
**Field Name**

**Description/Action**

**28. ATTACH JUSTIFICATIONS** Attach all invoices/documentation pertaining to requisition.

**29. NEXT** Click on **NEXT**

**Window Name:**  
**Checkout**

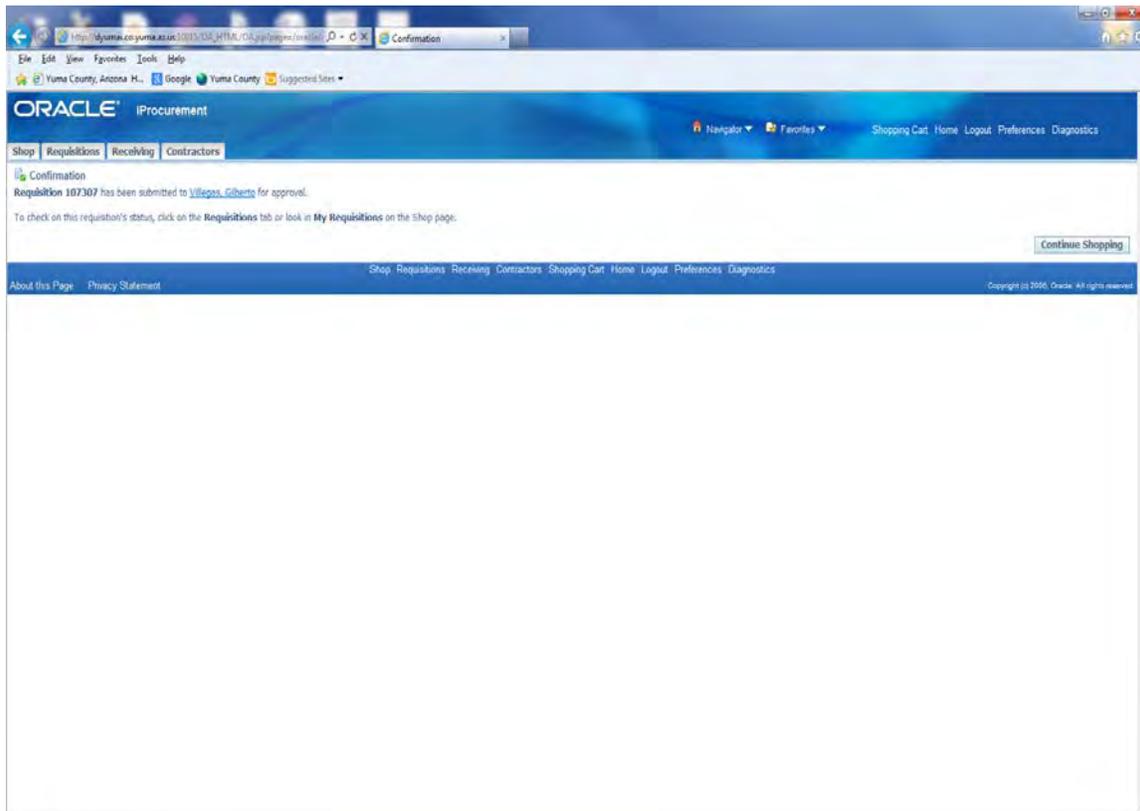


*A Requisition number has been assigned. Review the Requisition for accuracy before submitting.*

Field Name	Description/Action
30. SUBMIT	Click on <b>SUBMIT</b>

*Note: Both **SUBMIT** buttons are the same*

**Window Name:**  
**Checkout**



*Your Requisition is submitted and will be immediately placed in the Requisition Pool for the Purchasing Department to place on a Purchase Order. You will be able to Receive this Requisition after a Purchase Order has been issued, however you will not need to know the Purchase Order number to enter the receiving information.*



*End of procedure*



# Oracle User Procedure

## **Title:**

*Approve Notifications*

## **Description:**

Use the Notification Details Web page, accessible through the Notifications Summary menu in Purchasing, to manage your pending approval queue and take approval actions. In the Notifications Summary list, notifications for the following Purchasing documents appear. The Send Notifications for Purchasing Documents process must be running for some of these notifications to be sent:

- Purchase orders and requisitions that require approval action
- Requisitions or purchase orders that are incomplete

## **Oracle Prerequisites:**

- Documents created, completed or forwarded for review/approval.

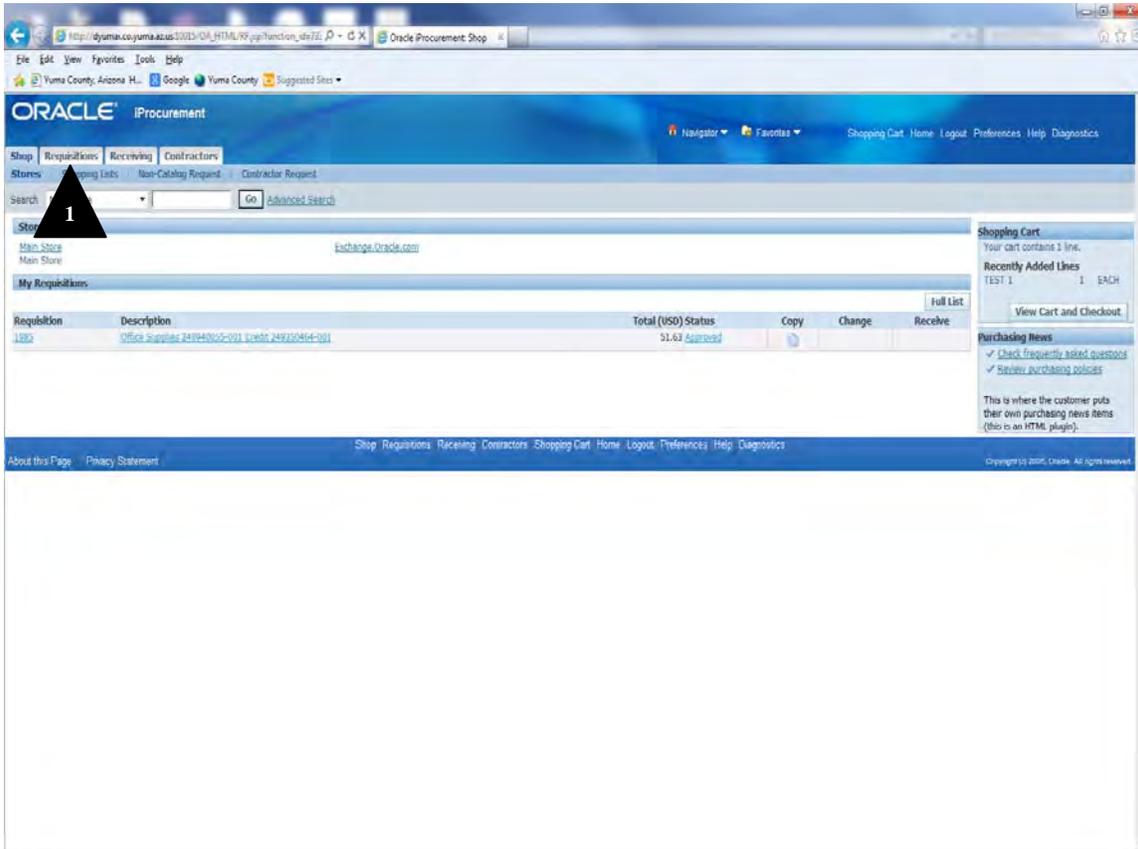
## **Oracle Responsibility:**

- iProcurement Approver.

### ***Menu Path***

ORACLE HOME PAGE ➤ SELF-SERVICE LOGON LINKS ➤ INTERNET  
PROCUREMENT HOME PAGE

**Window Name:**  
iProcurement Home Page



The *To Do List* region contains notifications that require your attention.

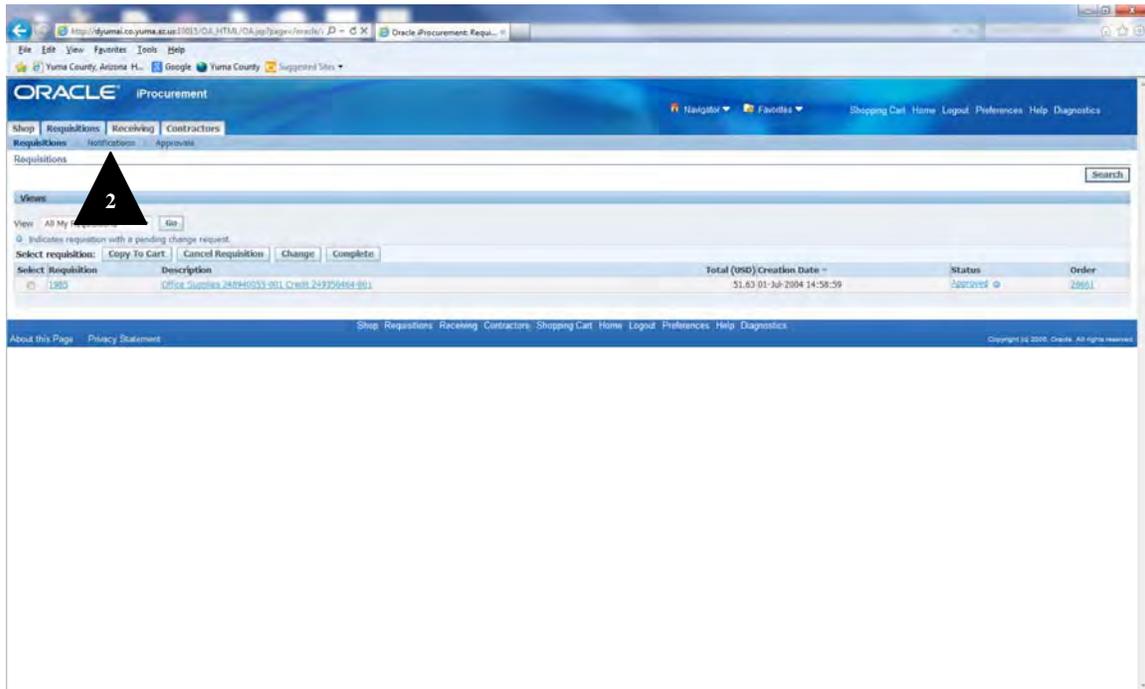
**Field Name                      Description/Action**

**Note:** There are several document approval actions available in the *Notification* region: Approve, Approve and Forward, Forward, and Reject. It is possible to reassign a notification to another approver if the person is in the approval hierarchy..

- 1. REQUISITIONS**    Select requisitions to access *Notification Detail* form.

## Window Name:

### Notifications

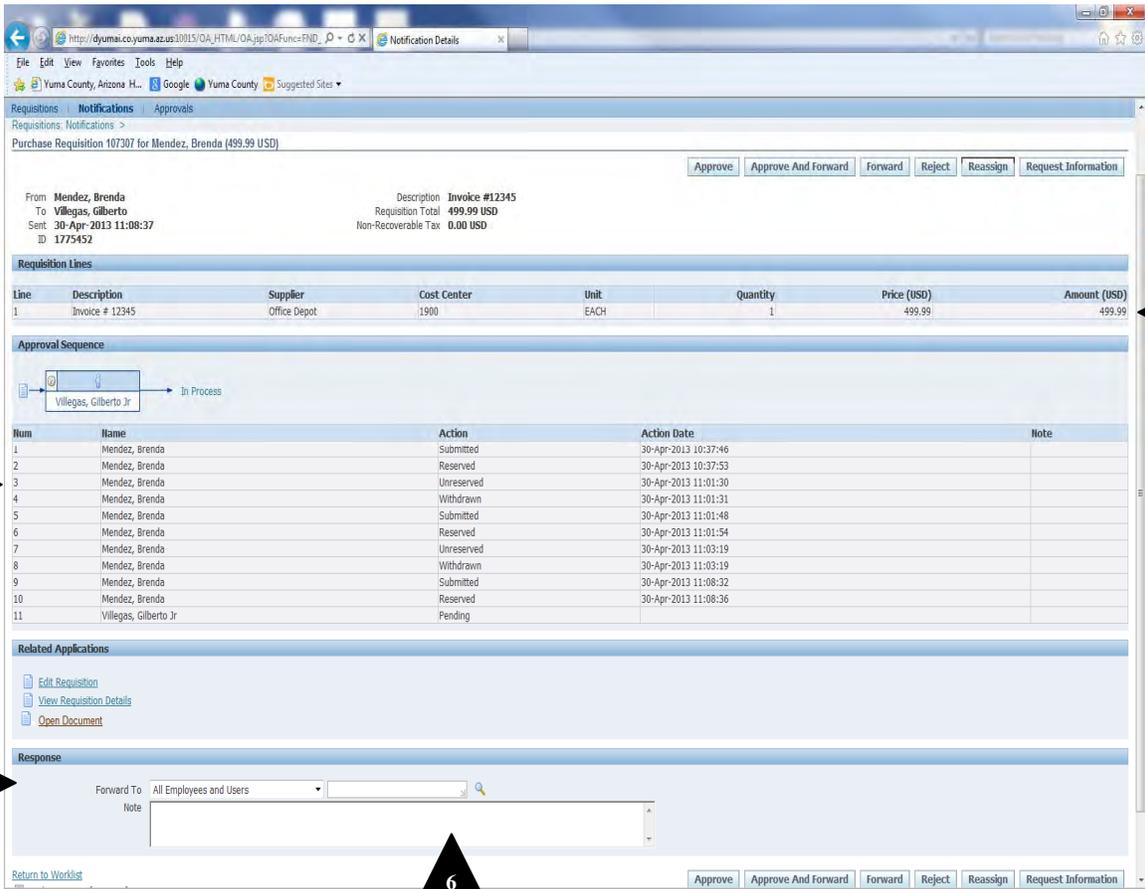


### Field Name                      Description/Action

2. Select Notifications.

**Window Name:**

**Notifications**



From An open notification, you can drill down to the document and modify it, if the Approver Can Modify option has been enabled for the document type. Your responsibility will define your level of access and your privileges.

**Field Name Description/Action**

**3. REQUISITION LINES** View REQUISITION LINES.

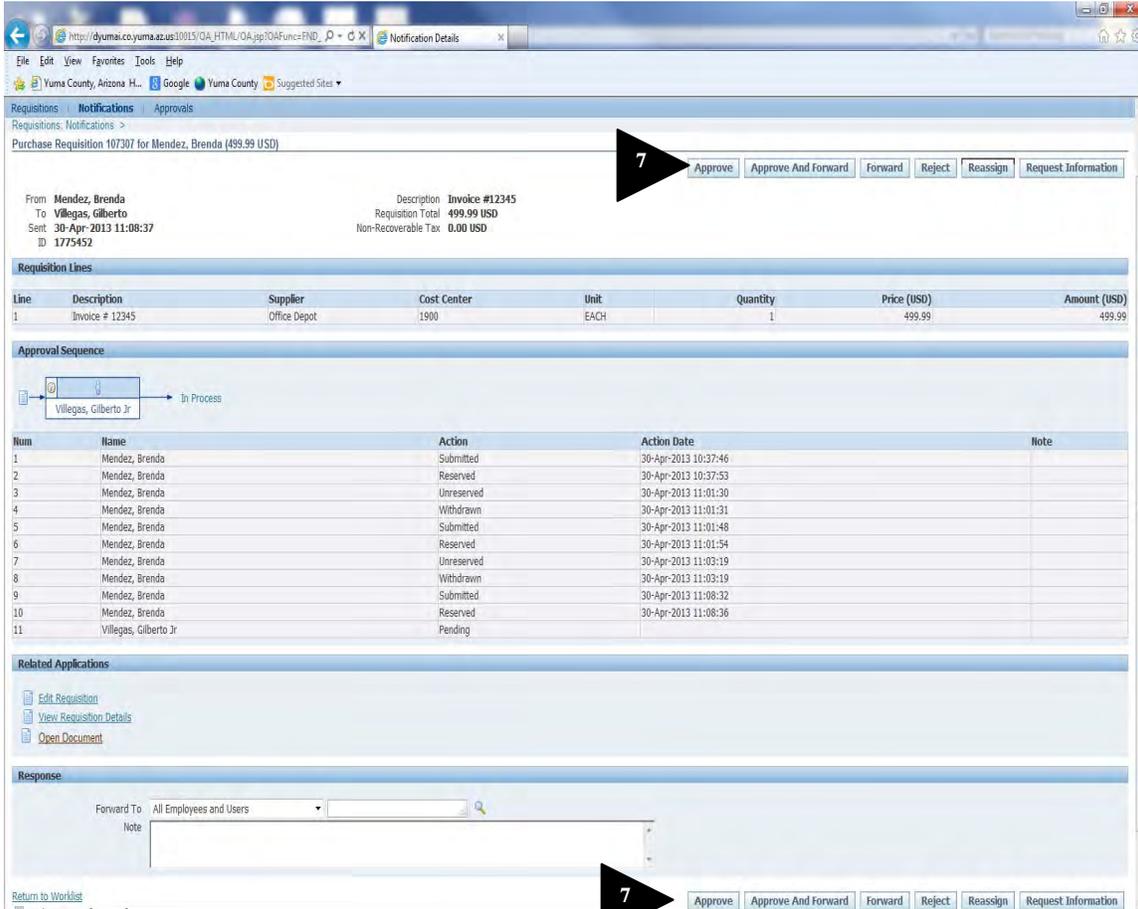
**4. APPROVAL HISTORY** View APPROVAL HISTORY.

**5. FORWARD DOCUMENT** Enter the person to whom you wish to forward the notification.

**6. NOTE** Enter a NOTE for the next approver or the owner of the document.

**Window Name:**

**Notifications**



**Field Name**

**Description/Action**

**7. APPROVAL ACTION**

Approve – Approve the Document

Approve and Forward – Approve the document but also forwards to another approver for final approval.

Forward – Forwards to another approver

Reject – Reject the document. The document owner will receive a notification of the rejection.

**9. Close the window.**



End of procedure



# Oracle User Procedure

## **Title:**

*Create Rule to Reassign Notifications to a Temporary Approver*

## **Description:**

*This procedure may be used by all approvers to reassign 'To Do Notifications' (awaiting your response) if you are unable to respond to them for a period of time. Rules are created, edited and deleted by the user, not the purchasing department. Rules are an available feature in the Core Purchasing Application, but often not used. iProcurement makes rules much more user friendly and visible to use.*

## **Oracle Prerequisites:**

- *You must have approval authority.*

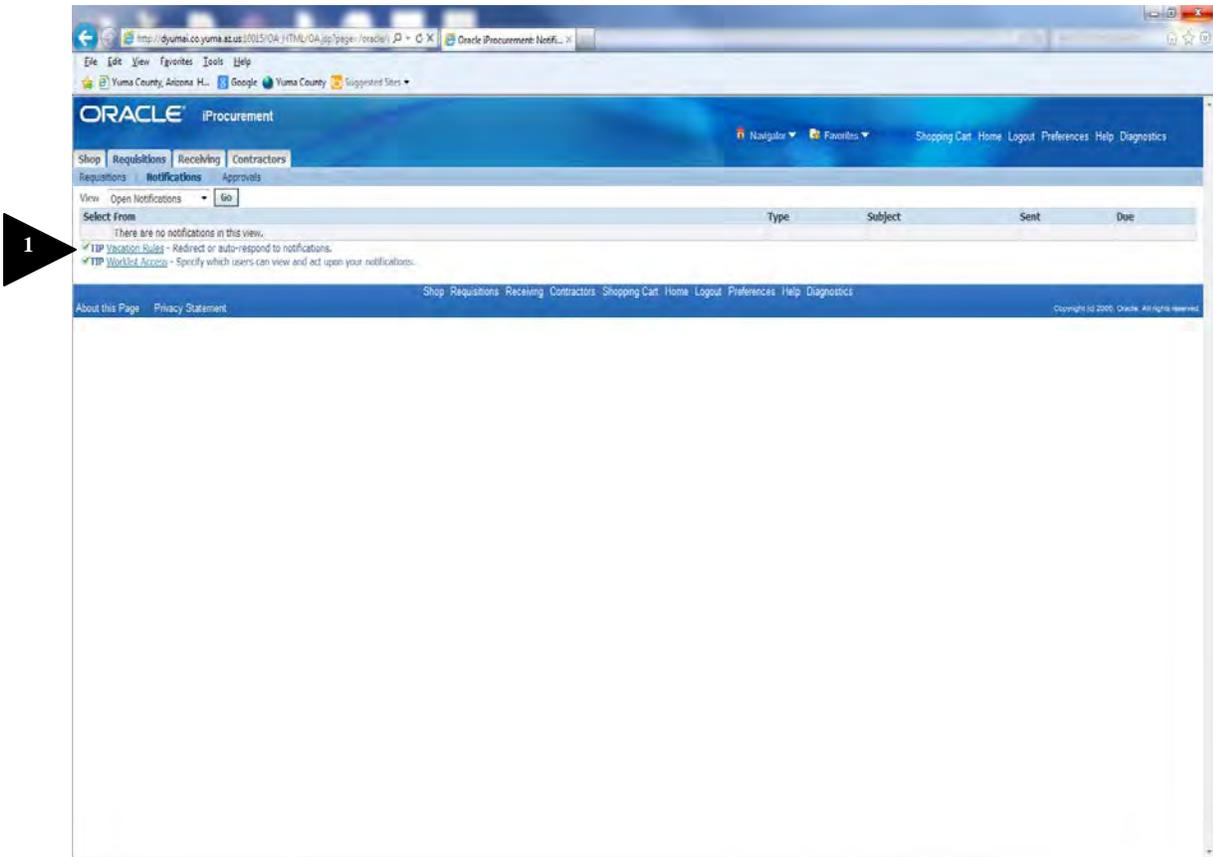
## **Oracle Responsibility:**

- iProcurement Approver.

### ***Menu Path***

ORACLE HOME PAGE ➤ SELF-SERVICE LOGON LINKS ➤ INTERNET  
PROCUREMENT

**Window Name:**  
*iProcurement Home Page*



**Field Name**

**Description/Action**

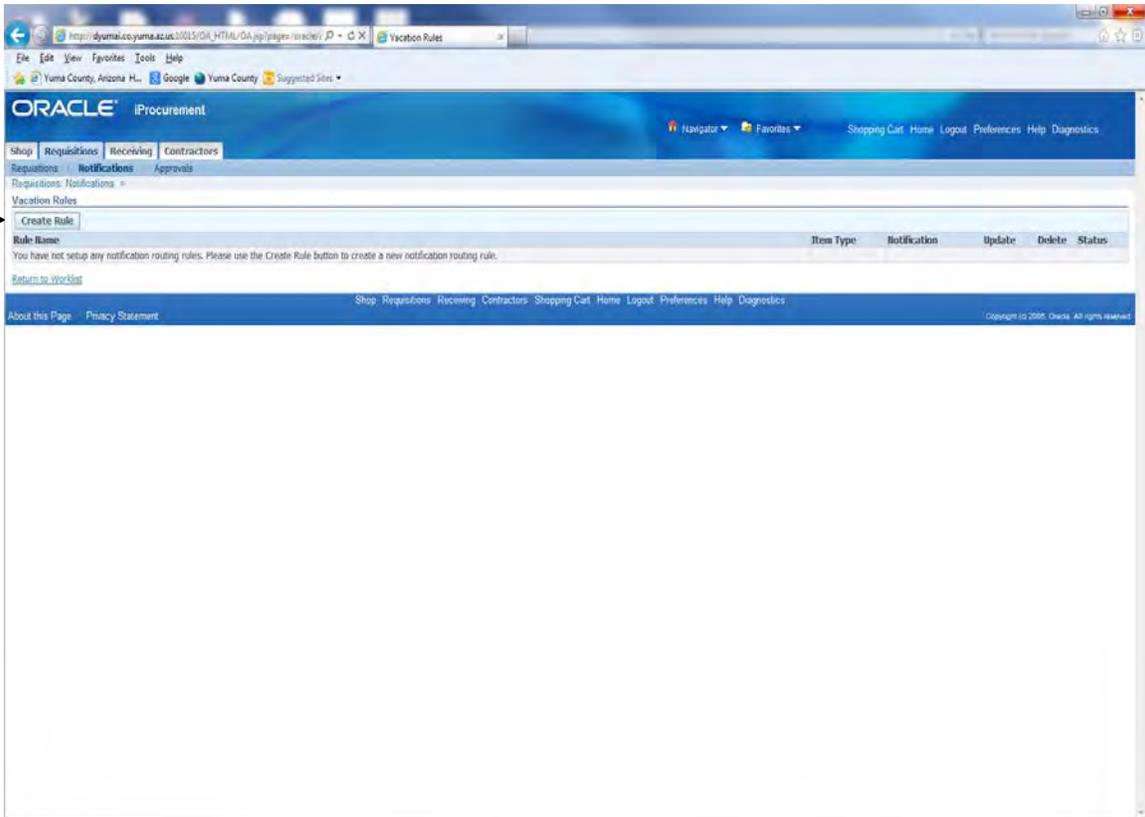
**1. VACATION RULES**

Click on Vacation Rules *Reassign Your Notifications.*

**Window Name:**

**Requisition Status – Notifications Reassignment**

2



**Field Name**

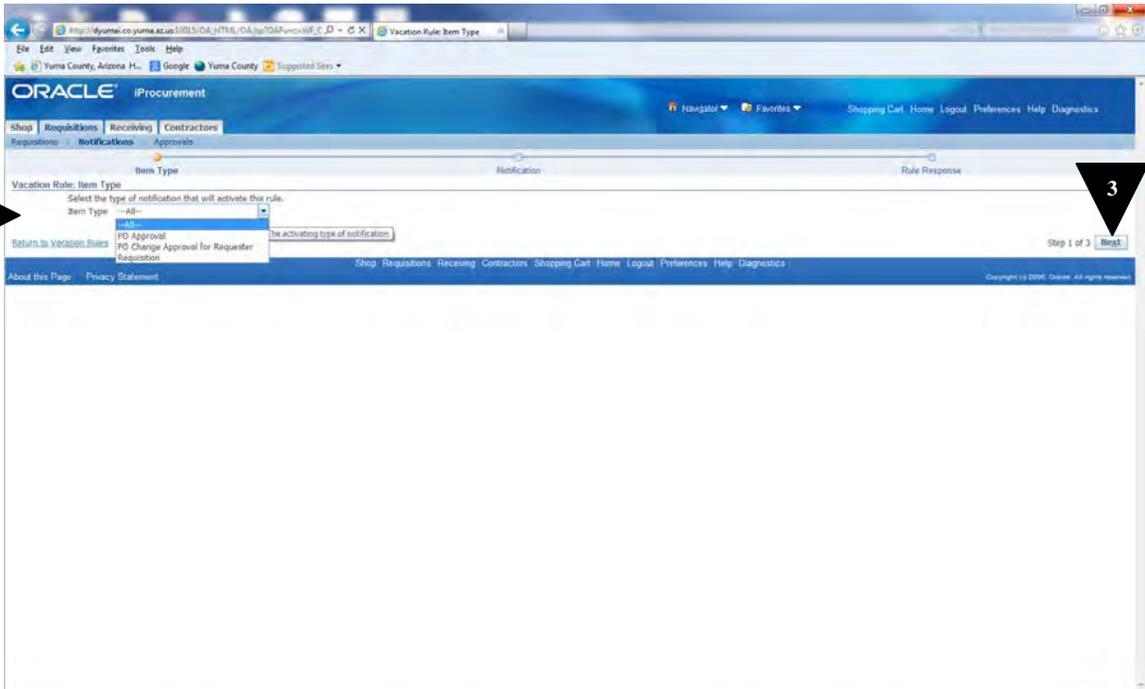
**Description/Action**

**2. CREATE RULE**

Optional. Click on **CREATE RULE**.

**Window Name:**

### Requisition Status – Notifications Reassignment



**Field Name**

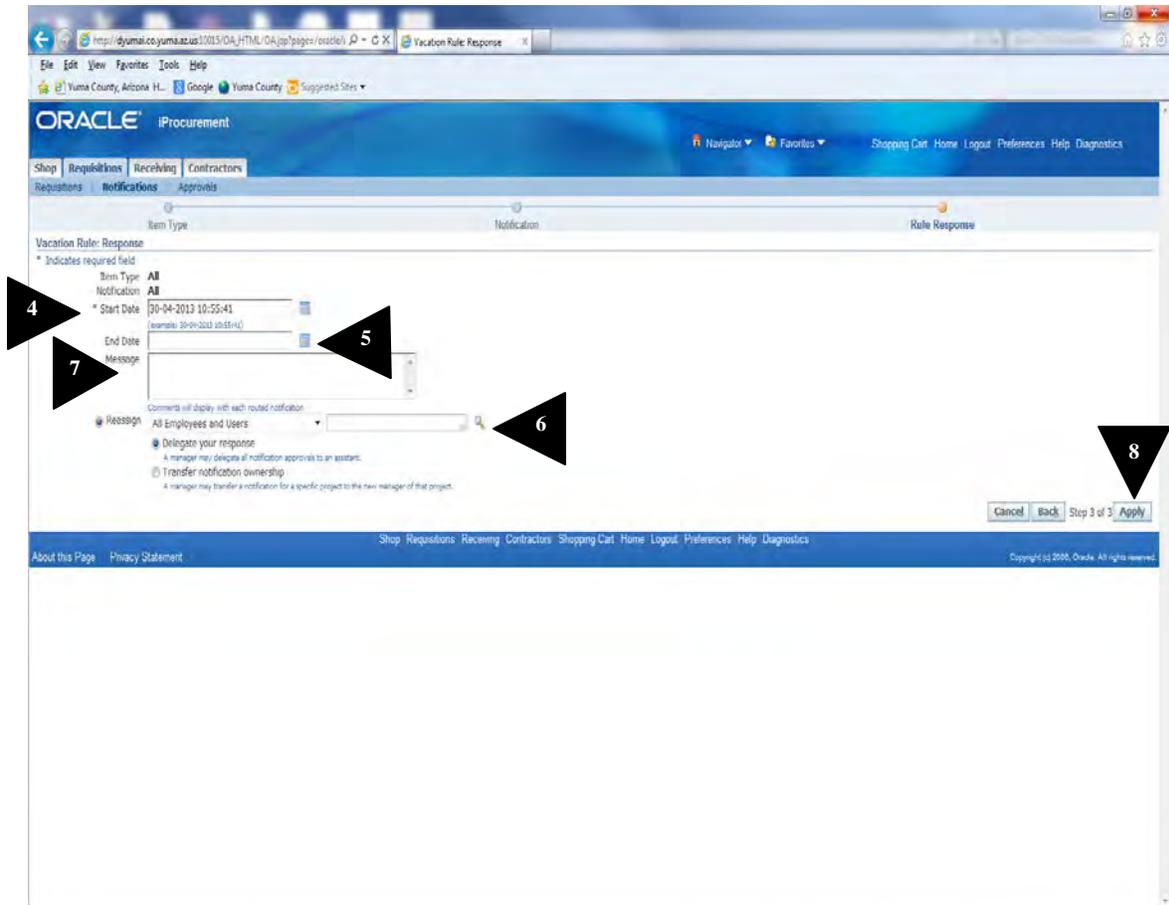
**Description/Action**

**3. SELECT TYPE**

Click Next

**Window Name:**

**Requisition Status – Reassignment Rule**



**Field Name**

**Description/Action**

**4. START DATE**

Enter the start date for the notification reassignment

**5. END DATE**

Enter the end date for the notification reassignment

*Note: If an end-date is not entered, the rule will stay in effect until the rule is end-dated or deleted*

**6. RECIPIENT**

Select the name of the person who will receive your notifications while you are out of the office

*Note: the recipient will need to have appropriate approval rights to approve the reassigned requisition. The reassign recipient does not assume the approval rights of the original approver.*

**7. COMMENTS**

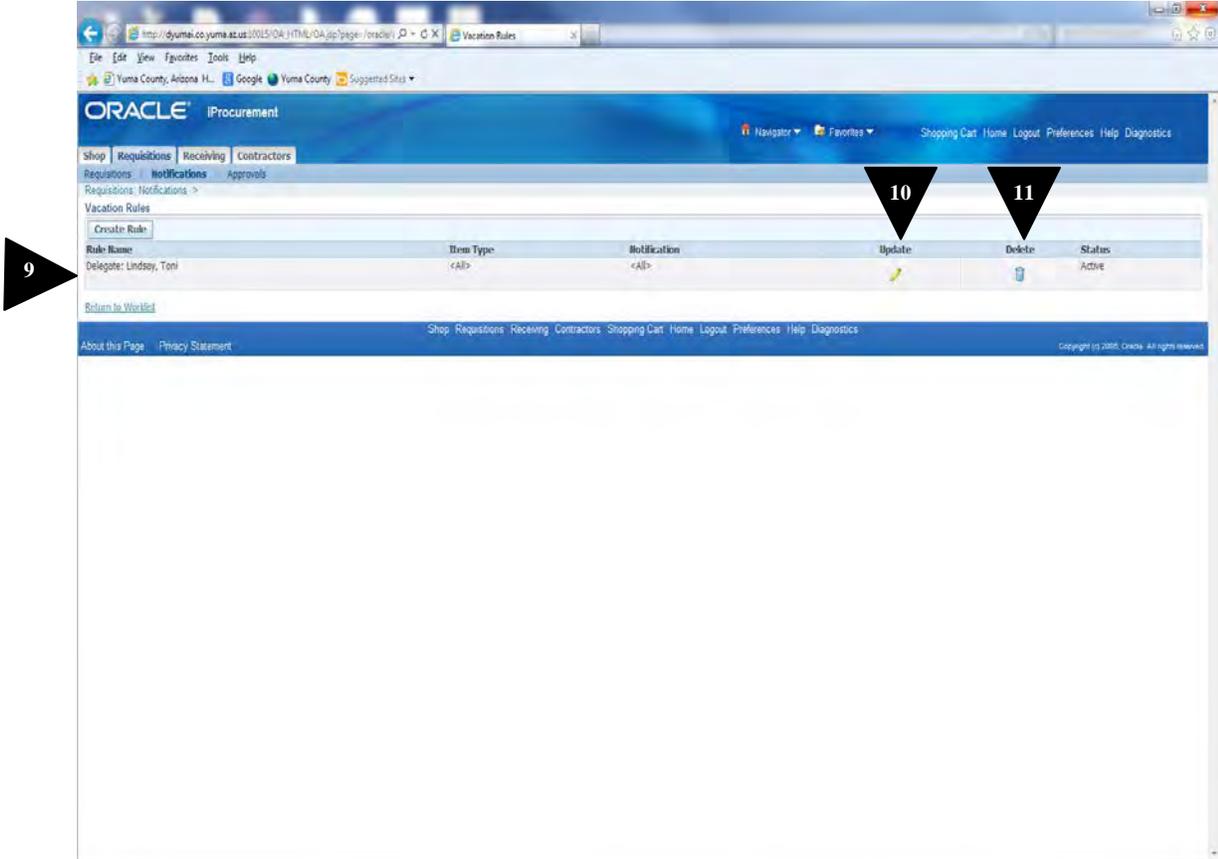
Optional. Enter comments for the temporary approver to see with each forwarded notification

**8. Click on **APPLY****

 **Note:** This will complete the *Notification Reassignment Rule*.

**Window Name:**

*Requisition Status – Reassignment Rule*



**Field Name**

**Description/Action**

**9. RULE NAME**

Select an existing rule if changes are needed.

**10. UPDATE**

Click on UPDATE to edit an existing rule.

**11. DELETE RULE**

Click on DELETE to delete the rule.



End of procedure



# Oracle User Procedure

## **Title:**

*Withdraw a Requisition*

## **Description:**

*This procedure may be used by all Requisitioners to change a Requisition after being submitted for approval, but before being placed on a Purchase Order.*

*Even though a requisition is found in the Approvers 'To Do' notifications list, it can be changed or cancelled. When the requisition is cancelled, it will be removed from the current Approvers' notification list.*

*Requisitions can be changed or cancelled any time prior to conversion into a Purchase Order. If the requisition has already been placed on a Purchase Order, the Purchase Order will need to be cancelled first.*

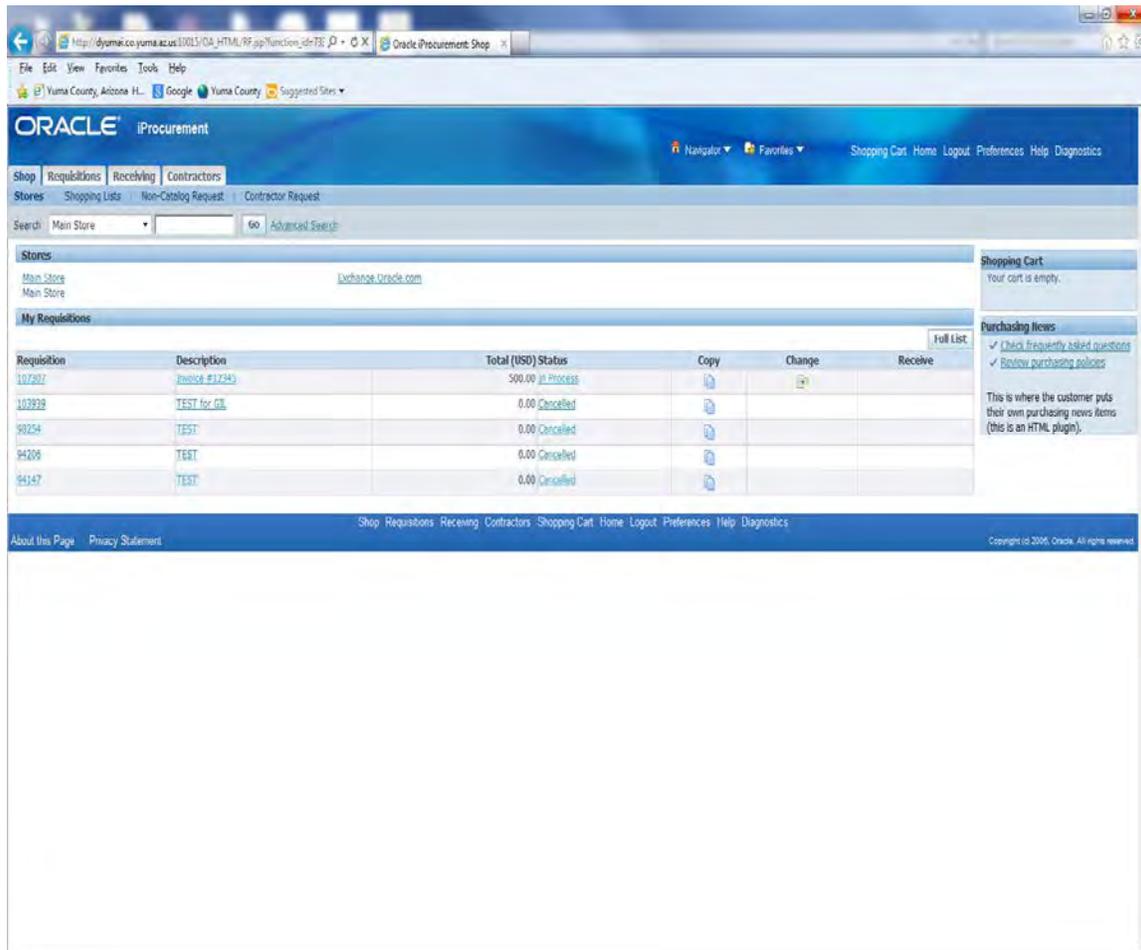
## **Oracle Prerequisites:**

- *Requisition has been submitted for approval.*
- *Requisition has not been placed on a PO.*

### ***Menu Path***

ORACLE HOME PAGE ➤ SELF-SERVICE LOGON LINKS ➤ INTERNET  
PROCUREMENT

**Window Name:**  
**iProcurement Home Page**



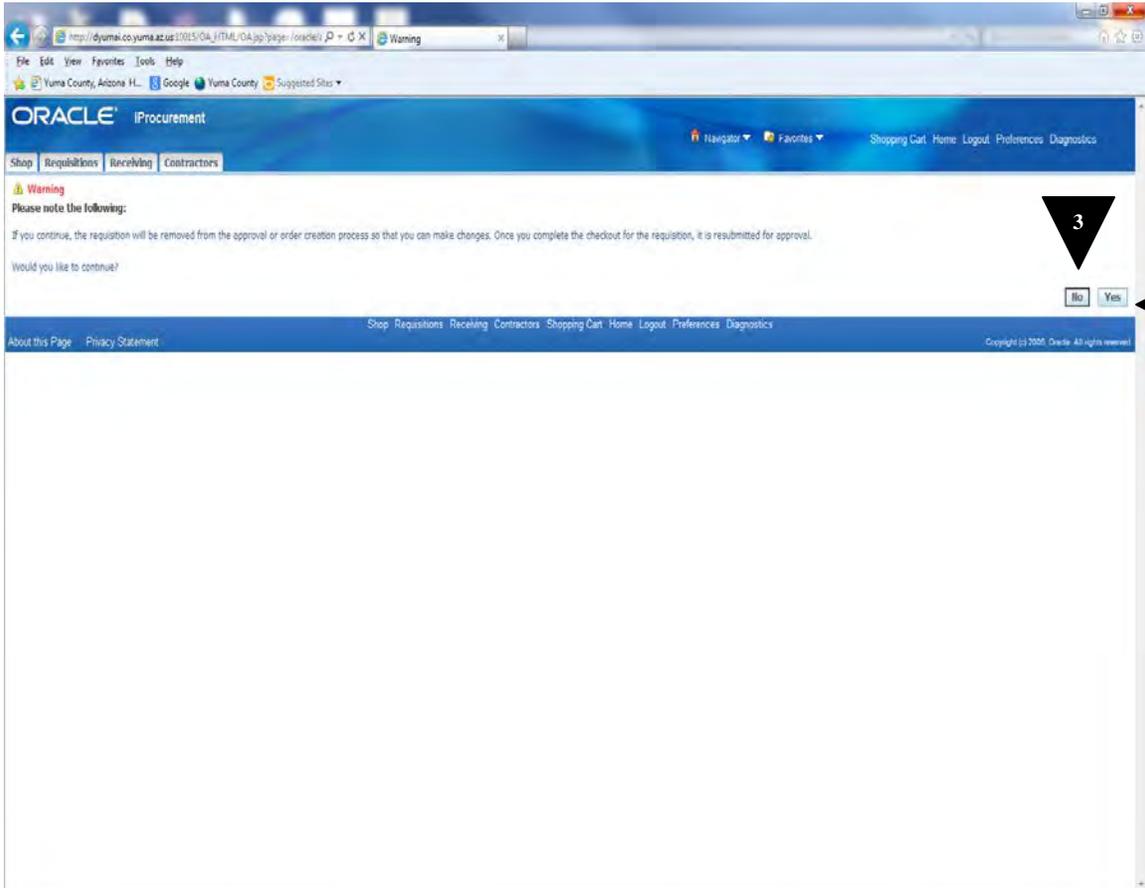
Your latest requisitions will be displayed on the *Shop* page.

**Field Name**                      **Description/Action**

- 1. REQUISITION**      Click on the REQUISITION number you would like to withdraw from approval



**Window Name:**  
**Requisition Withdraw**



Requisition Withdrawal options are displayed.

**Field Name**

**Description/Action**

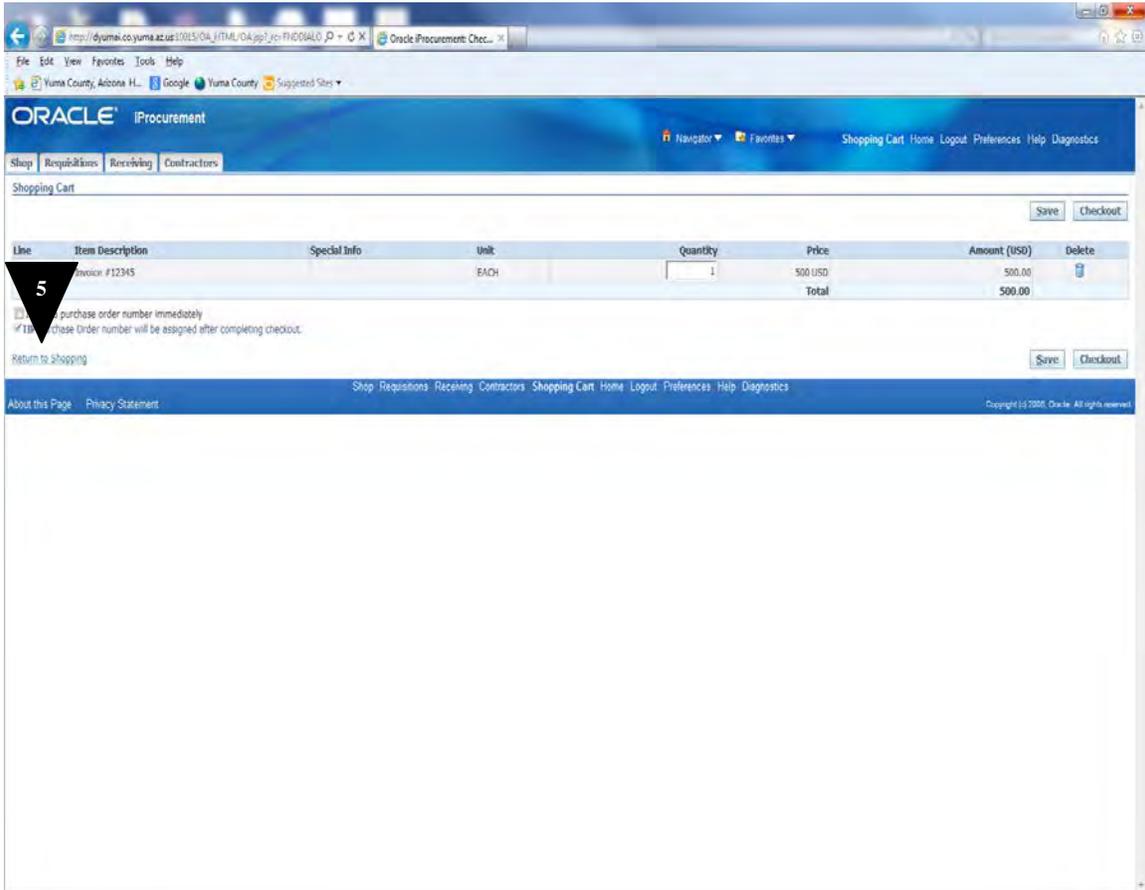
**3. NO**

Select NO if you do not want to proceed with changing the requisition.

**4. YES**

Select YES to proceed with changing the requisition.

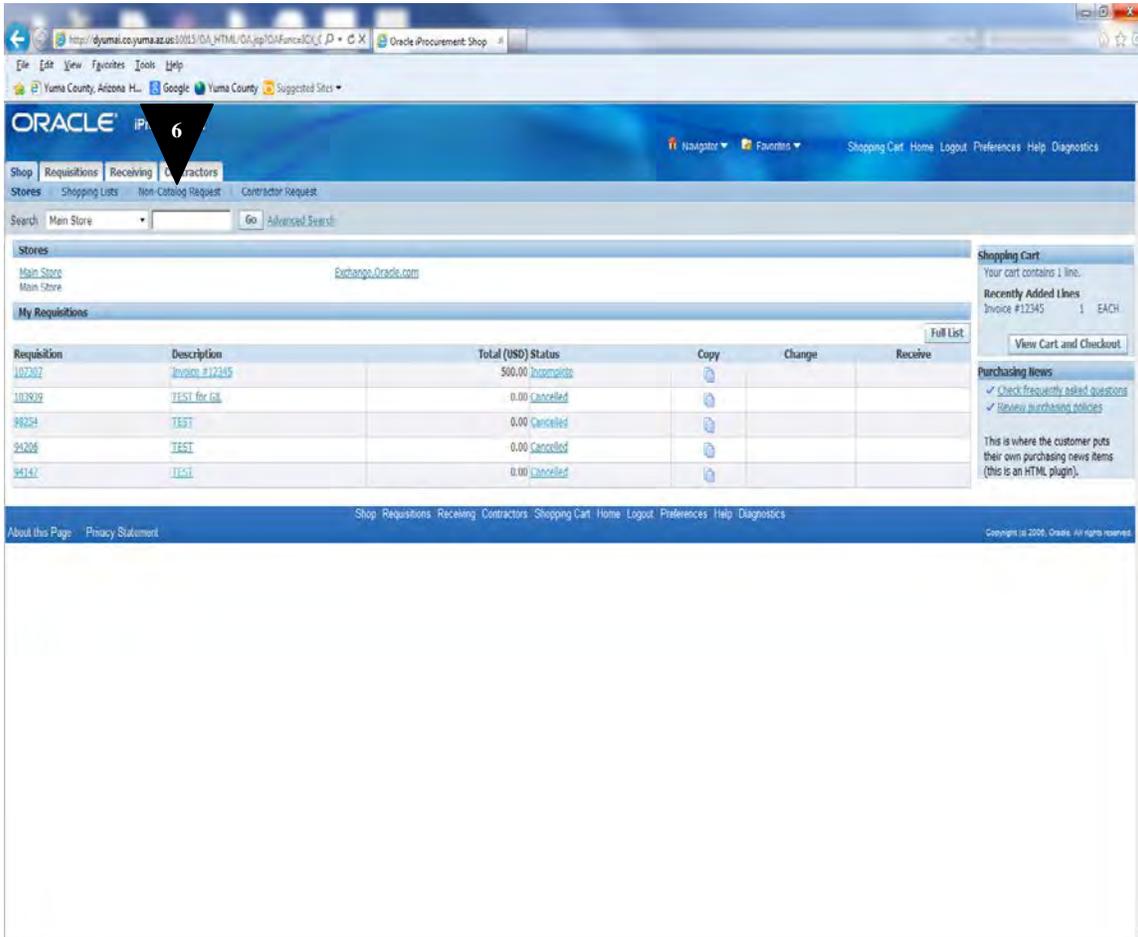
**Window Name:**  
**Requisition Withdraw**



Requisition Withdrawal options are displayed.

- | Field Name                   | Description/Action |
|------------------------------|--------------------|
| <b>5. RETURN TO SHOPPING</b> |                    |

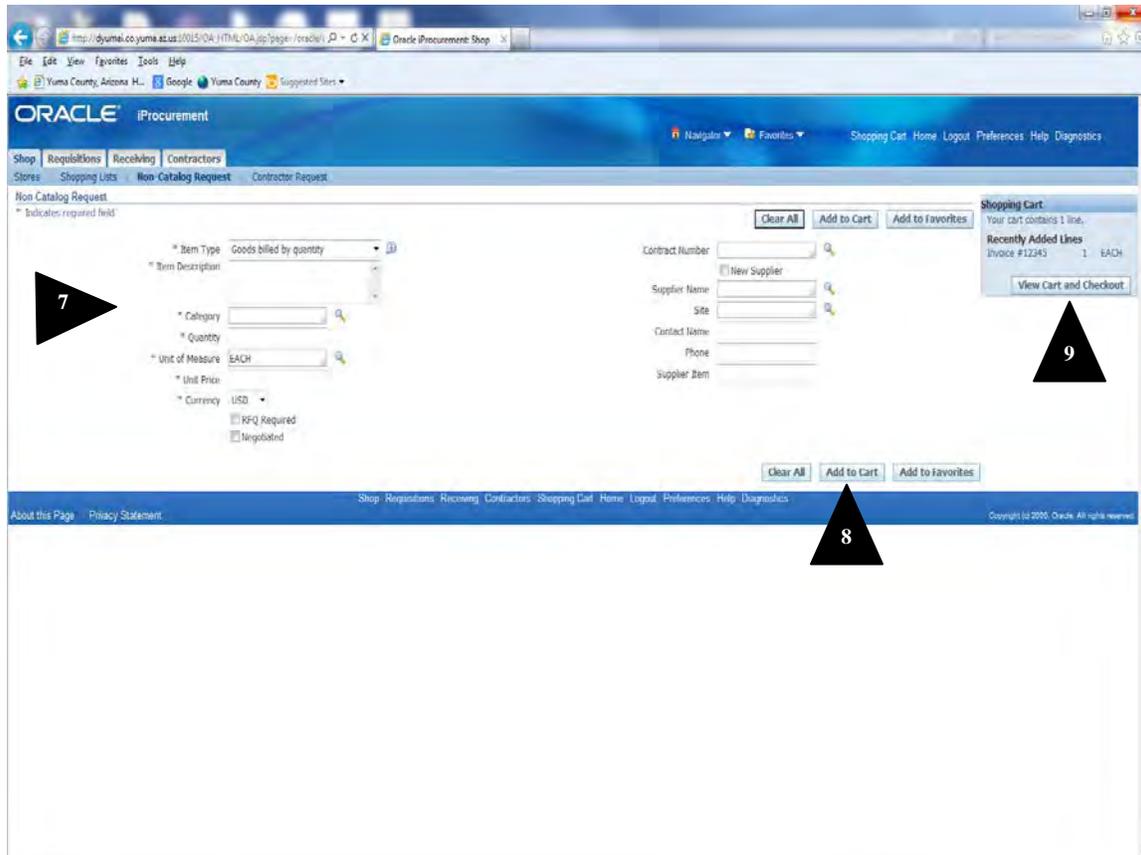
**Window Name:**  
**Requisition Withdraw**



Requisition Withdrawal options are displayed.

Field Name	Description/Action
<b>6. CREATE A NON-CATALOG REQUEST</b>	

**Window Name:**  
Requisition Withdraw



Requisition Withdrawal options are displayed.

**Field Name**

**Description/Action**

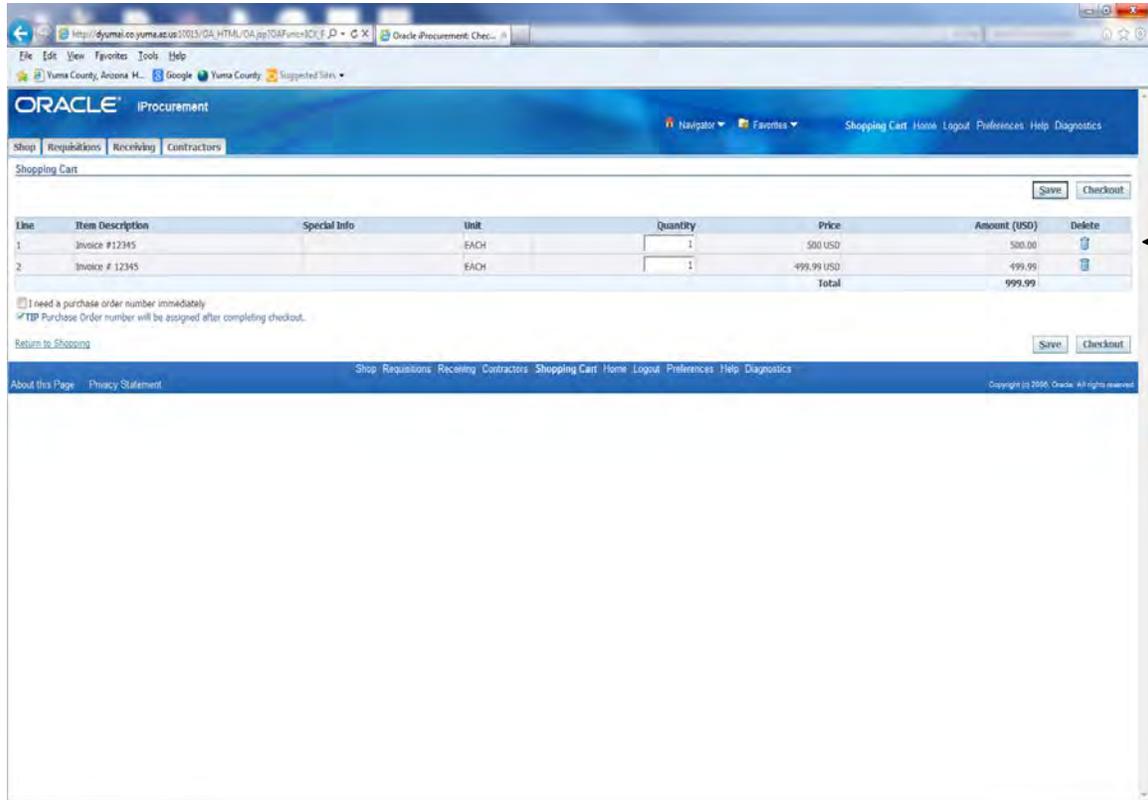
**7. ENTER INFORMATION**

Enter all Correct or Changed information as needed

**8. ADD TO CART**

**9. VIEW CART AND CHECKOUT**

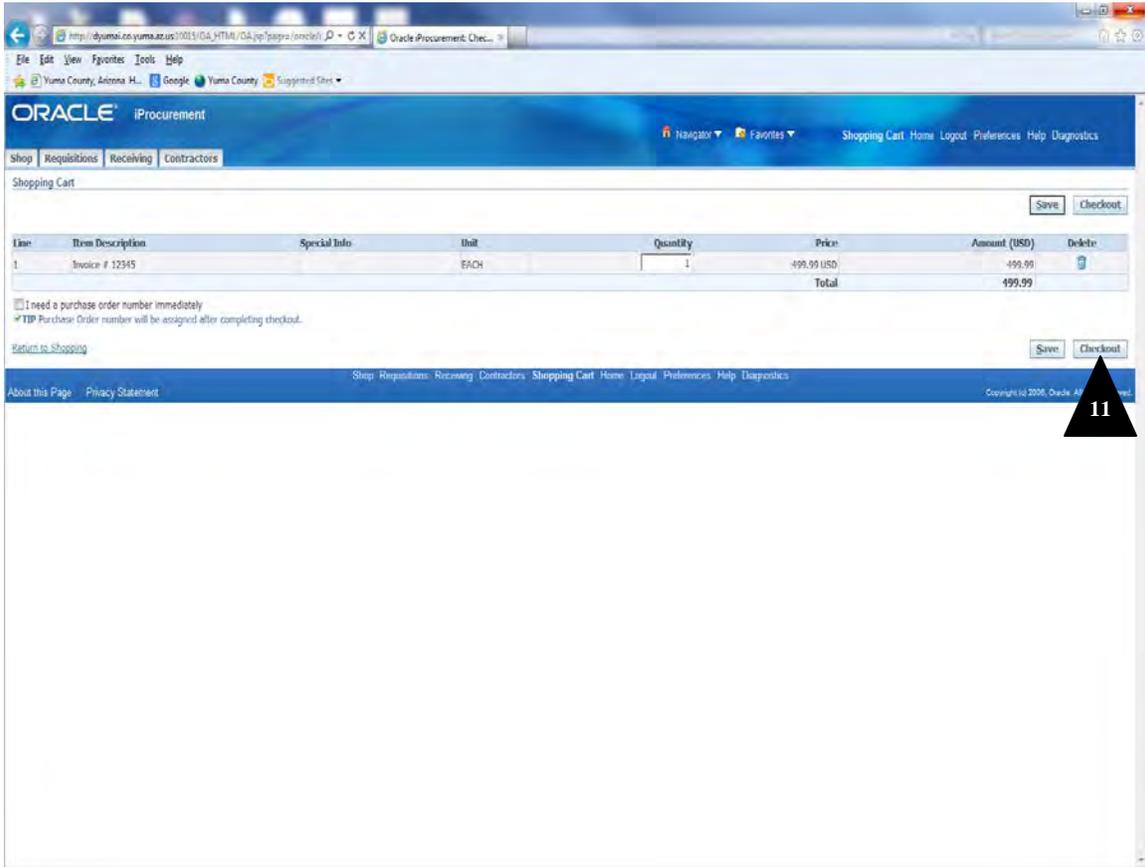
**Window Name:**  
Requisition Withdraw



Requisition Withdrawal options are displayed.

Field Name	Description/Action
10. DISCARD INCORRECT LINE	

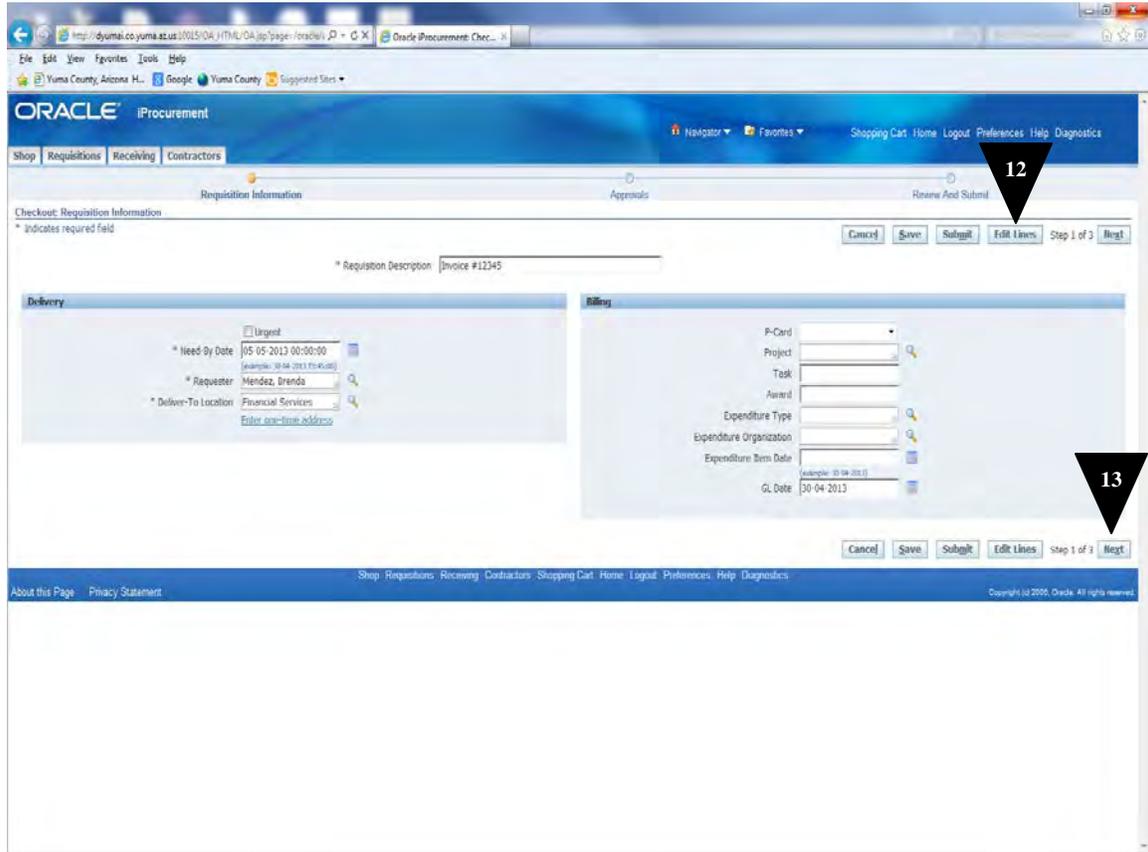
**Window Name:**  
Requisition Withdraw



Requisition Withdrawal options are displayed.

**Field Name**                      **Description/Action**  
**11. CHECKOUT**

**Window Name:**  
Requisition Withdraw



Requisition Withdrawal options are displayed.

**Field Name**

**Description/Action**

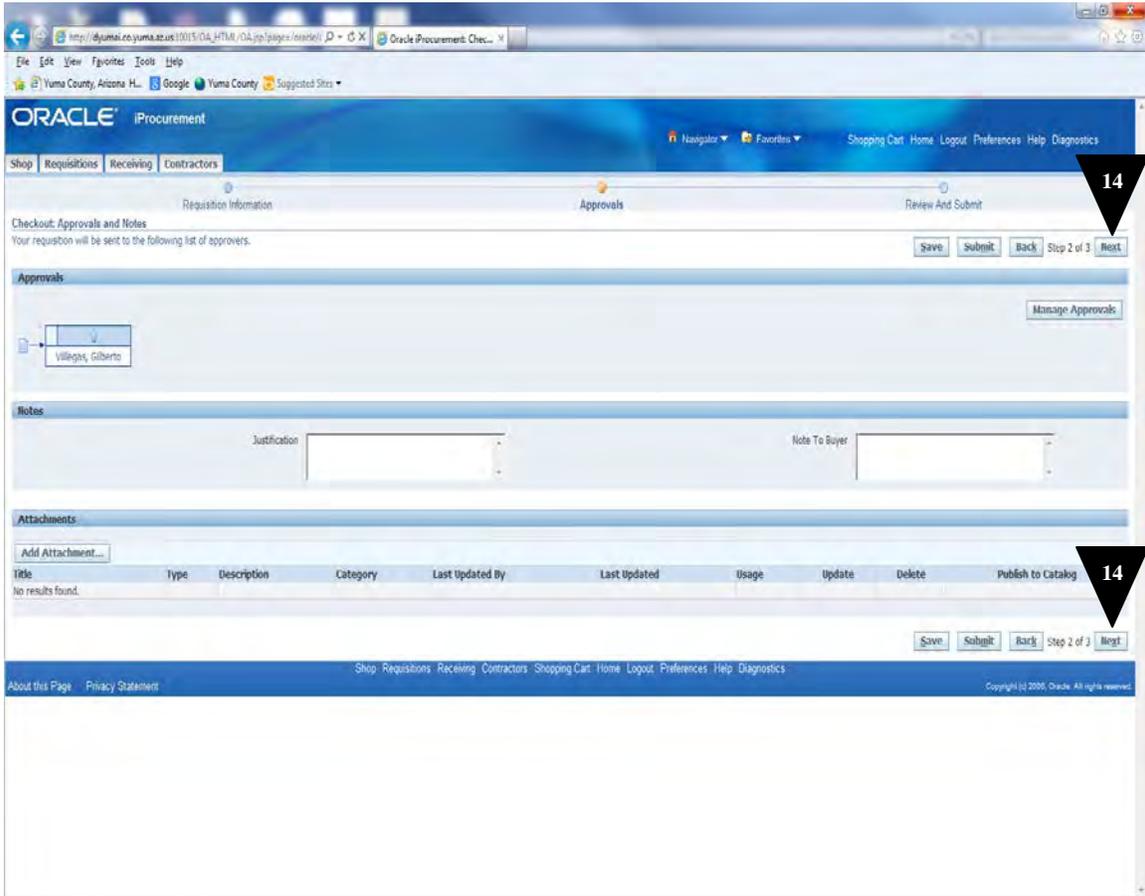
**12. EDIT LINES**

Click on Edit Lines to make necessary changes to charge account.

**13.NEXT**

Click on **NEXT**.

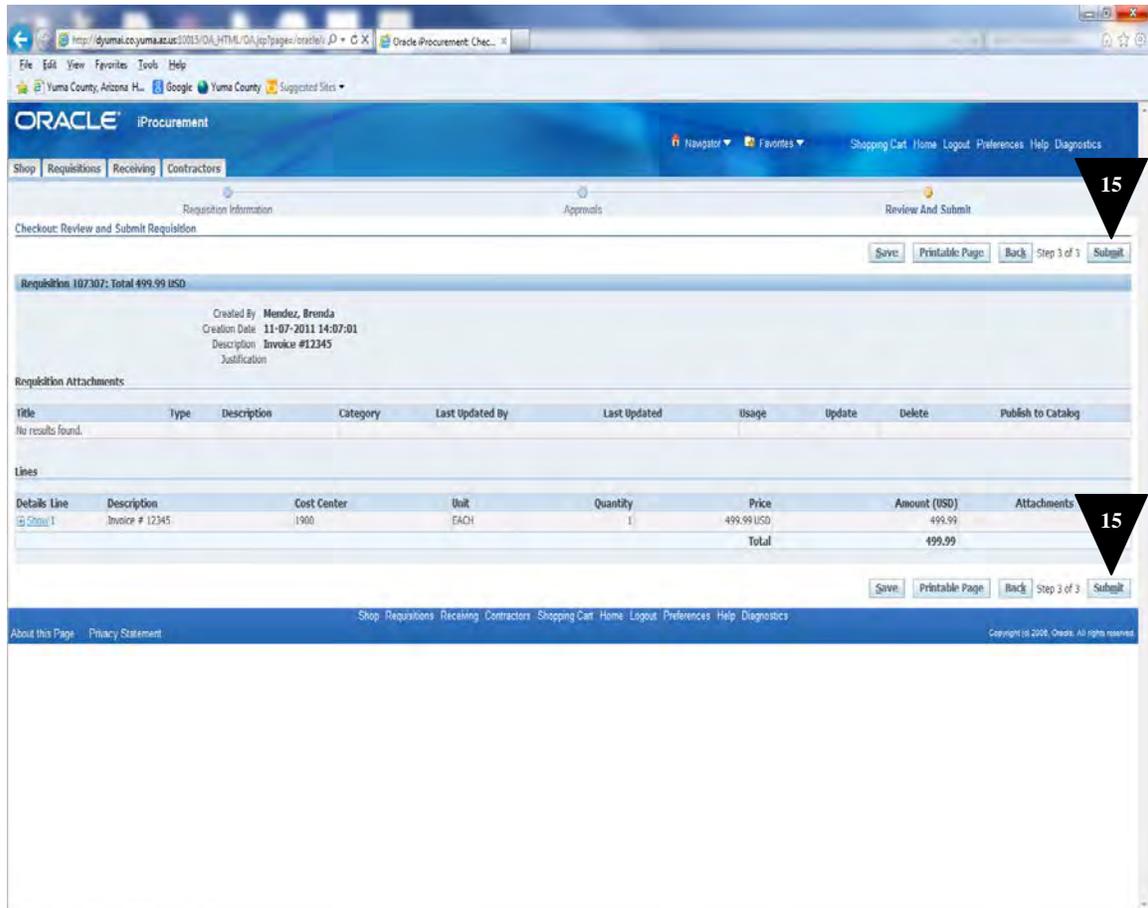
## Window Name: Requisition Withdraw



Requisition Withdrawal options are displayed.

Field Name	Description/Action
14.NEXT	Click on <b>NEXT</b> .

**Window Name:**  
Requisition Withdraw



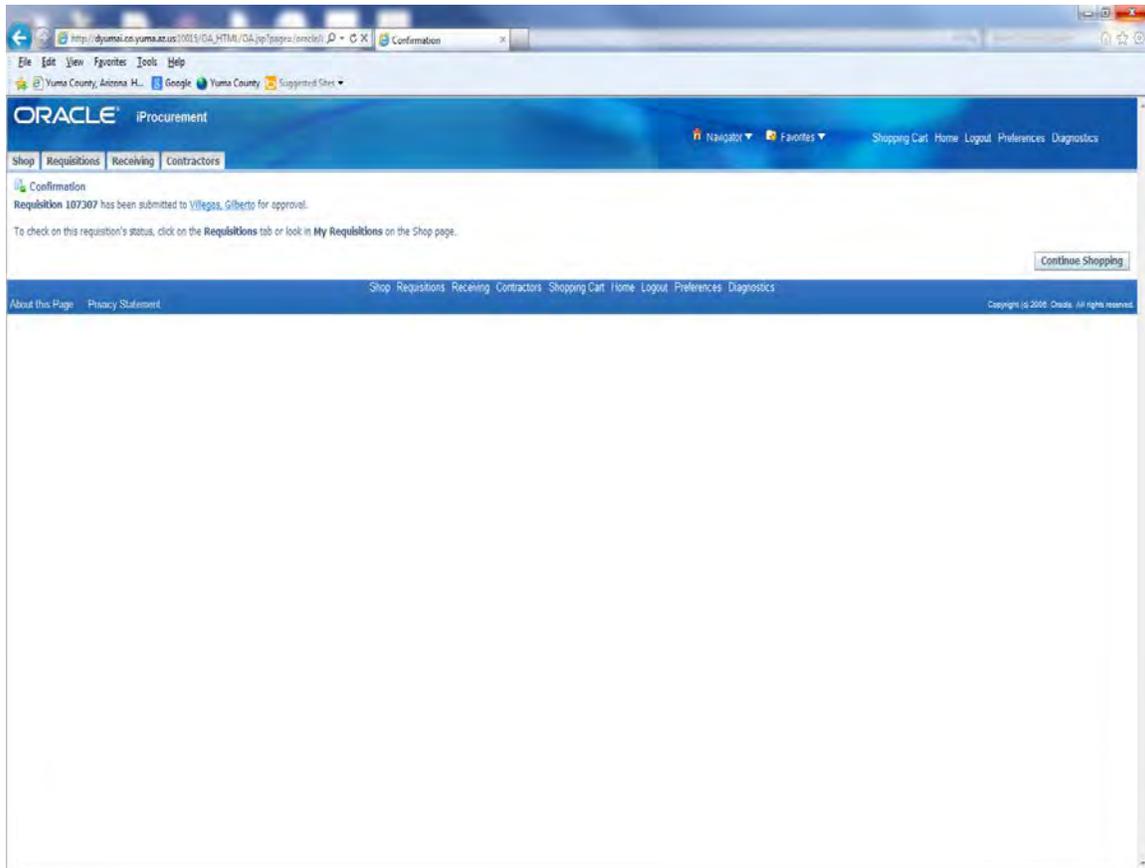
Requisition Withdrawal options are displayed.

**Field Name**                      **Description/Action**

**15. SUBMIT**                      Click on **SUBMIT**.

**NOTE: The same requisition number will be assigned.**

**Window Name:**  
Requisition Withdraw



*End of procedure*



# Oracle User Procedure

## **Title:**

*Payment Inquiry*

## **Description:**

*Use the Notification Details Web page, accessible through the My Requisitions, to manage your requisitions and view payment inquiry. In My Requisitions Full list, notifications for the following Requisitions appear. Click on desired requisition to obtain payment information.*

- *Payment Inquiry*
- *Requisitions Status*

## **Oracle Prerequisites:**

- iProcurement

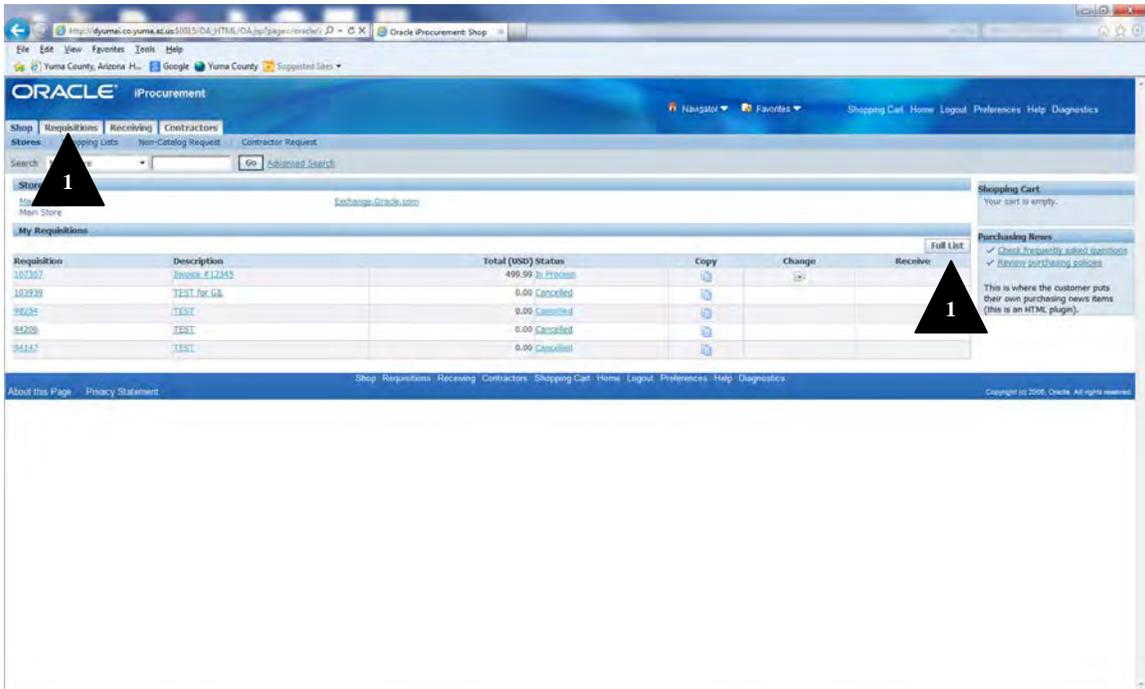
## **Oracle Responsibility:**

- iProcurement

### ***Menu Path***

ORACLE HOME PAGE > SELF-SERVICE LOGON LINKS > INTERNET  
PROCUREMENT HOME PAGE

**Window Name:**  
iProcurement Home Page



The *To Do List* region contains notifications that require your attention.

**Field Name                      Description/Action**

 **Note:** May click on Requisitions Tab of Full List

1. **REQUISITIONS**    Select requisitions Tab of Full List.

**Window Name:**  
**Requisitions**

Select Requisition	Description	Total (USD)	Creation Date	Status	Order
107207	Invoice #12245	499.99	11-07-2011 14:07:01	In Process	
103939	TEST for GE	0.00	29-03-2011 15:53:20	Cancelled	
98154	TEST	0.00	26-10-2010 11:44:35	Cancelled	
94106	TEST	0.00	07-07-2010 11:28:54	Cancelled	
84147	TEST	0.00	30-06-2010 17:11:52	Cancelled	
93020	TEST	0.00	25-05-2010 10:47:19	Cancelled	
71101	esp@theskull.it	0.00	29-10-2008 10:04:08	Cancelled	
63508	test	0.00	01-04-2008 12:08:13	Cancelled	
42971	INV #54895	0.00	09-11-2006 15:51:59	Cancelled	
42578	Inv# 54895	0.00	05-11-2006 14:47:52	Cancelled	
37586	QUOTE # 071806 0930 ORACLE ELECTRONIC CHECK MODIFICATIONS (AP & PAYROLL) COMPACT FLASH (CF) CARD, UPDATES & FEDEX SHIPPING	925.00	19-07-2006 11:23:38	Approved	58536
37315		0.00	28-06-2006 12:46:23	Cancelled	
34720	Reconciliation Petty Cash for May 9, 2006	564.05	09-05-2006 16:23:38	Approved	56618
31423	TEST	0.00	24-02-2006 17:15:43	Cancelled	
26585	TEST...TEST	0.00	14-11-2005 09:17:24	Cancelled	
18324	Public Resource Management Group LLC Inv. # 347	4,125.00	26-04-2005 10:29:11	Approved	44883
14023	HP Inkjet 2600In Printer	0.00	21-01-2005 16:26:53	Cancelled	
14006	Financial Services Petty Cash for the month of January 2005	0.00	21-01-2005 14:40:06	Cancelled	
12674	Reimbursement for Doug Allen	100.00	04-01-2005 14:30:39	Approved	39591
10359	Office Depot Calendar Order	167.99	10-11-2004 12:00:54	Approved	38528
9445	ERP Continue Shopping Test	0.00	02-11-2004 09:41:40	Cancelled	
9427	HP Inkjet Cleartra K1, C85344	51.46	01-11-2004 16:52:48	Approved	36072
7656	Office Supplies	94.43	30-09-2004 10:12:05	Approved	34362
6928		0.00	17-09-2004 16:45:18	Cancelled	
6859	This is only a Test through ERP	0.00	15-09-2004 15:15:53	Cancelled	
4548	This is only a test please respect Thanks jim	0.00	16-08-2004 14:18:50	Cancelled	
1000	INV #541359	0.00	16-06-2004 14:30:54	Approved	34238

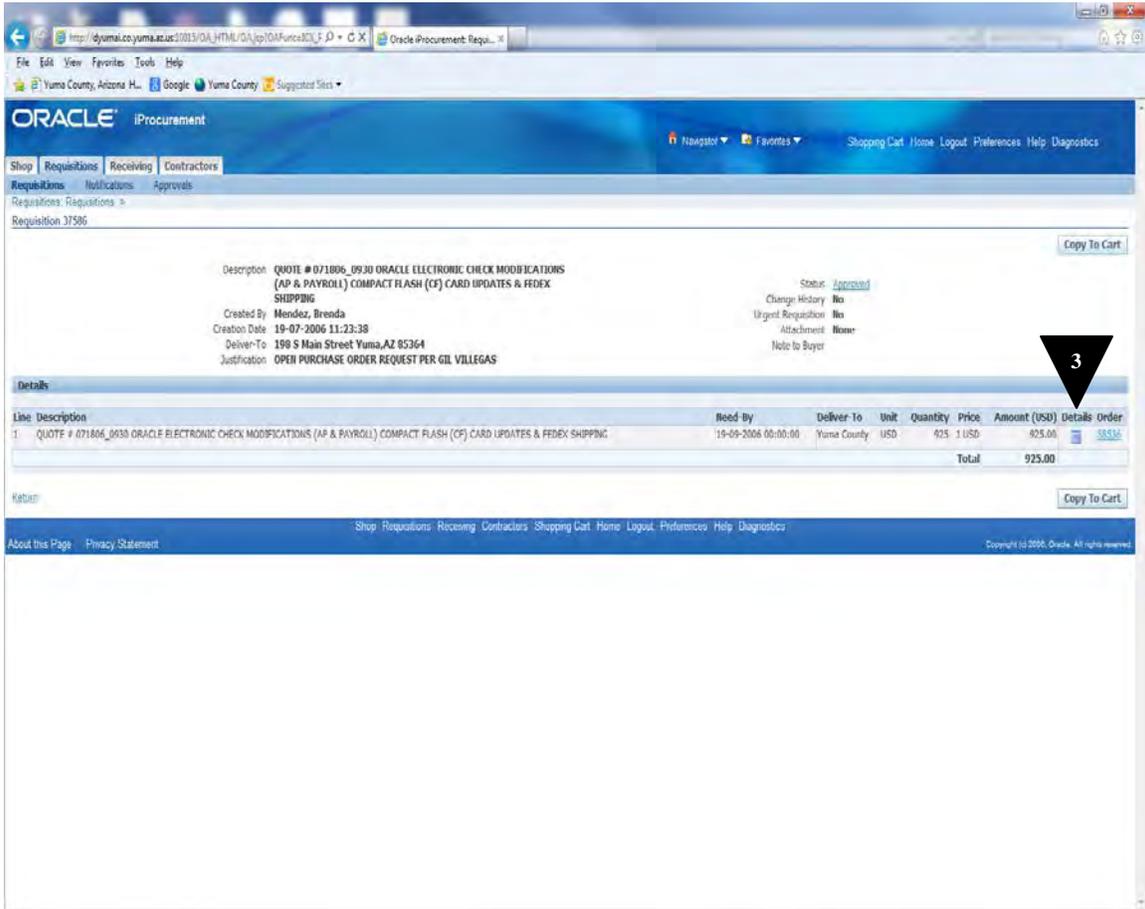
2

**Field Name                      Description/Action**

2. Select Requisition.

**Window Name:**

**Requisitions:Requisitions**



**Field Name**

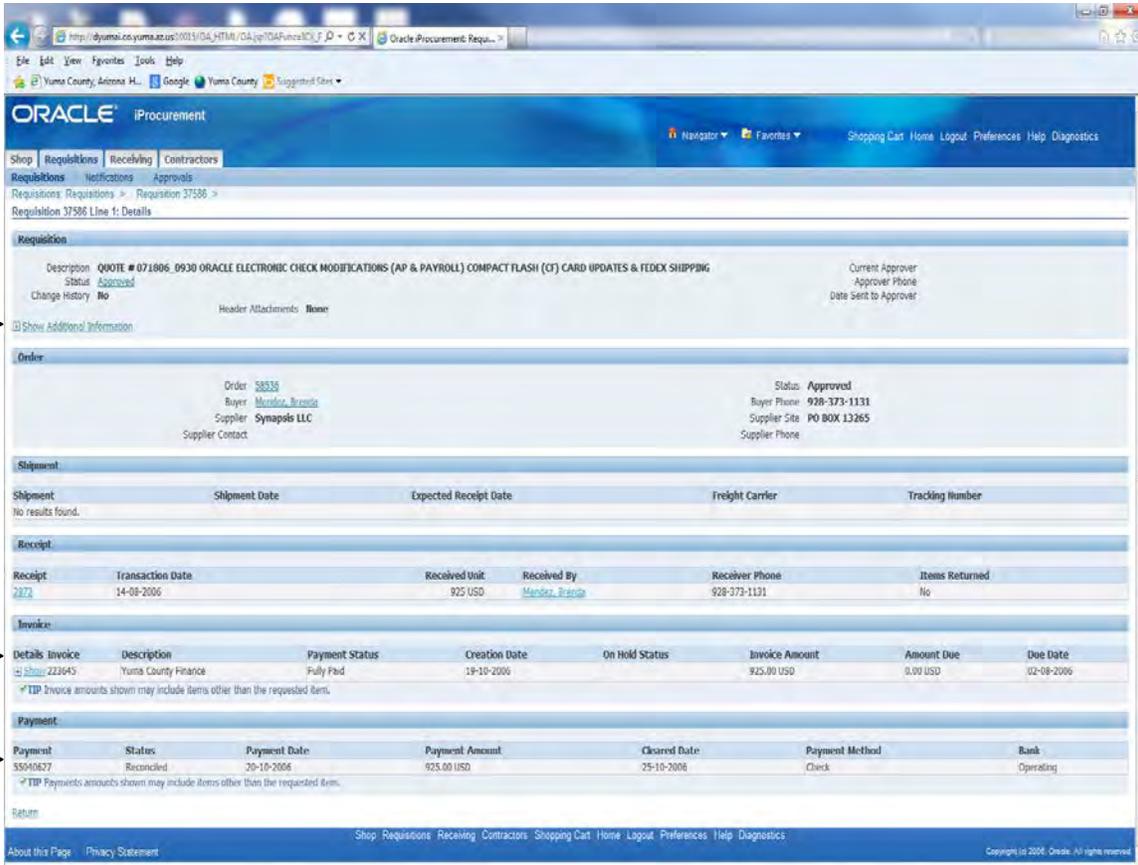
**Description/Action**

**3. DETAILS**

Click DETAILS.

**Window Name:**

Requisitions: Requisitions



**Field Name**

**Description/Action**

- 4. INVOICE INFO** Contains Invoice #, Description, Payment Status, Creation Date, Invoice Amount
- 5. PAYMENT INFO** Contains Check #, Status, Payment Date, Payment Amount, Cleared Date
- 6. ADDITIONAL INFO** Click to show additional information such as Charge Account



End of procedure

# FINANCIAL SERVICES DIRECTORY

WITH QUESTIONS ABOUT:

## **iProcurement**

Brenda Mendez 373-1131  
Ernestina "Rose" Ybarra 373-1125

## **Account Payable**

Leo Tanory 373-1139  
Yesenia Luevanos 373-1117  
Maggie Gamboa 373-1116

### ***\*P-Card , Visa***

Grace Lopez 373-1123

### ***\*Travel***

Vickie Arviso 373-1175

## **General Ledger**

Toni Lindsay 373-1122  
Carmen Castro 373-1118

### ***\*Accounts Receivable***

Elizabeth Canela 373-1121

### ***\*Capital Assets***

Denise Butler 373-1126

### ***\*Projects & Grants***

Vacant Position 373-1124

## **Financial Reporting**

Hector Wakamatzu 373-1130  
Elsa Garcia 373-1136  
MaryJo McIntyre 373-1135

## **Payroll**

LeeAnne Rachels 373-1127  
Tammy Vasquez 373-1128  
Carmen Anderson 373-1129

## **General Information**

Ernestina "Rose" Ybarra 373-1012