Oracle Procurement Cloud

Procurement Implementation

18C

Activity Guide

Feb 2019

Important!

You’ve been assigned a unique, two-digit student number for this course. In the following pages, wherever you see “xx,” substitute your student number.

Note: Your student number is valid only for the duration of the course.

Activities for Lesson 1:
Course Overview

Demonstration 1-1: Running the Session Warmer

Instructor Note: The instructor should demonstrate Practice 1-1: Running the Session Warmer.

Demonstration 1-2: Exploring the Oracle Procurement Cloud Implementation Resources

Overview

In this demonstration, you show how to access implementation information contained in Oracle Help Center.

Prerequisites

Use Google Chrome version 62+ or Mozilla Firefox version 52+ to complete all demonstrations and practices in this training course.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. In your browser, navigate to docs.oracle.com.

   The **Oracle Help Center** home page opens. It provides access to most of the information available for all Oracle products. This includes guides, release information, instructional videos, and much more.
2. Click the **Cloud** icon to access information related to Oracle Procurement Cloud applications.
3. Click the **Applications** tab.
4. Under **Enterprise Resource Planning**, click the **Procurement** link.

   Note that you can choose which release to view.

   Note the breadth of resources available from the **Get Started** page.
5. Click the **Books** link.
6. Locate the **Implementation** section and click the **HTML** link under **Implementing Procurement**.
7. After observing the table of contents, click **Back** in your browser and locate the **User** section.
8. Click the **HTML** link under **Using Procurement** and observe the table of contents.
9. Close the browser window.

Demonstration Complete

You have demonstrated how to view documents in **Oracle Help Center**.

Demonstration 1-3: Navigating Oracle Cloud Applications

Instructor Note: The instructor should demonstrate Practice 1- 2: Navigating Oracle Cloud Applications.

Practice 1-1: Running the Session Warmer

Instructor Note: The instructor should demonstrate this practice first, as demonstration 1-1. Use the prc00.instructor user login instead of the prcXX.student user login.

Overview

In this practice, you will run the session warmer script in your classroom environment. Running the session warmer caches key activities in the application to improve response performance.

Prerequisites

Use Google Chrome version 62+ or Mozilla Firefox version 52+ to complete all demonstrations and practices in this training course.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. Open a new browser tab and go to the URL for the training environment.

   If you are on the **Environment Landing** page, continue with step #2.

   If you are on the application **Sign In** or other application page, go the **Environment Landing** page. You can locate it by replacing the text after oracledemos.com in your URL with `/main.html#!/main`.

   For example, if your application Sign In page URL (shown truncated) looks like this:
   `https://abcd-login.oracledemos.com/oam/server/obrareq.cgi...`

   then your Environment Landing page URL looks like this:
   `https://abcd-login.oracledemos.com/main.html#!/main`
2. On the **Environment Landing** page, click **Demo Tools**.
3. Click **Session Warmers**.
4. Click **PROC**, and then click **Procurement**.
5. A popup browser window opens.
   Allow the warmer to run until the popup browser window closes on its own. You can ignore any messages displayed in this window.
6. Close the **Environment Landing** page.

Practice 1- 2: Navigating Oracle Cloud Applications

Instructor Note: The instructor should demonstrate this practice first, as demonstration number 1-2. Use the prc00.instructor user login instead of the prcXX.student user login.

Overview

In this practice, you will navigate Oracle Cloud applications using many of the buttons, links, and menus that your instructor showed during the earlier demonstration.

Prerequisites

Use Google Chrome version 62+ or Mozilla Firefox version 52+ to complete all demonstrations and practices in this training course.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. Sign in to the application and navigate to the **Home** page.
2. In the **APPS** bar, click **Procurement**.
3. Observe the layout of Procurement work area icons, and the global header icons:

For example, observe the work area icon for Purchase Requisitions: 

4. Discuss the Notifications icon: 
5. In the **global header**, click your user image or user name to show the **Settings and Actions** menu.
6. Discuss how the **Show Help Icons** menu item controls visibility of online help icons.
7. Discuss the **Access Accessibility Settings** menu item.
8. From the **Settings and Actions** menu, click **Set Preferences**.
9. Discuss the following links on the **Preferences** page:
   Watchlist, which shows tasks that need your attention.
   Accessibility (which takes you to the **General Preferences: Accessibility** page
10. In the **global header**, click the **Home** icon.

Using Setting and Actions

11. In the **global header**, click your user image or user name to show the **Settings and Actions** menu.

    Note that the selections here vary depending on the security configuration for your user account. The important selections are those that enable personalization of your home page, and **Applications Help**.

12. Click **Home**.

13. Click the **Personalize Springboard** icon to navigate to the **Apps** page.
    Here, you can configure which apps are shown in the APPS section of the Home page.
14. Click **Cancel**.
15. Open the **Navigator** menu. Note that the selections here vary based on your assigned application roles.
16. Find the **Procurement** application group and click it to expand it. Then click **Negotiations**.
17. Point out the different infolets and their content. Depending on the environment there may be no actual data displayed.

Using the Action Icons to Locate Suppliers and Place Orders

18. Let's perform some actions to locate suppliers of computer supplies. Click the **Tasks Panel** icon.
19. Click the **Research Suppliers** link.
20. On the **Research Suppliers** page, click the **Search** icon for the **Category Name** field.
21. In the **Search and Select: Category Name** dialog box, in the **Category Name** search field enter the value: `comp`.
22. Click **Search**. Notice that two results are returned.
23. Select the row for **Computer Supplies** and click **OK.**
24. When you return to the **Research Suppliers** page, notice that **Computer Supplies** appears in the **Category Name** field. Click the **Search** ***button*** (not the Search icon for the Category Name field that you used above) to perform a search**.** Suppliers of computer supplies are listed in the **Search Results** section.
25. Click the **View** menu located under the **Search Results** section label. Click **Columns**, and then select the **Supplier Number** checkbox. After the page refreshes, notice that the **Supplier Number** column is added to the display.
26. Click **Done.**
27. Sign out of the application.
28. Sign in to the application as user `calvin.roth` using the same password as your student user account. (User calvin.roth has transactional data in the system and also has the authorizations to perform the remaining tasks in this practice.)
29. From the **Navigator,** under **Procurement**, click the **Purchase Orders** work order link.
30. On the **Overview** page, click the **Task Panel** icon.
31. Click **Create Order**.
32. In the **Create Order** dialog box, click the search icon for **Supplier**.
33. In the **Search and Select: Supplier** dialog box, in the **Supplier** field, enter: `Lee`
34. Click **Search.**
35. In the **Search** results, select the row for Lee Supplies. (It should be the only row returned.)

36. Click **OK.**
37. When you return to the **Create Order** dialog box, note the different fields that have defaulted based on the supplier you chose.
38. Click **Create**.
39. On the **Edit Document (Purchase Order)** page, from the **Communication Method** list, select **E-mail**. Notice that after you select E-mail, the page refreshes and shows the email address of the supplier contact.
40. Scroll to the **Lines** subtab.
41. On the **Lines** subtab, click the **Add Row** icon.
42. After the input row appears, set:

Description	`Laptops`
Category Name	`Computer Supplies` Notice that as you enter a partial value, a search is performed automatically and the application displays all matches for that value. Type `comp` and select Computer Supplies from the list.
Quantity	`100`
Ea	`UOM`
Price	`450`

43. Let's add another line to the order. Click the **Duplicate** icon.
44. In the new row, change the following fields:

Description	Printers
Price	`100`

45. Note that operations such as Duplicate can also be performed by from the **Actions** menu. Note that some options available in the Actions menu have no corresponding icon.
46. From the **Actions** menu, click **Export to Excel**. Open the downloaded Excel file. (Click through any warning messages.) Note how the two lines you just defined are added as rows in the spreadsheet. With the line information in a spreadsheet, you can perform all the typical spreadsheet operations.
47. Close Excel and return to the **Edit Document** page.
48. Along the top of the page, there are several icons and buttons.

The **Social** icon lets you access any conversation threads related to the document.

The **Manage Approvals** button lets you modify the approval chain.

The **View PDF** button generates a PDF copy of the document.

49. Click the **Actions** menu. Note that the options from this **Actions** menu act on the entire document. The line level **Actions** menu you used earlier only contains options appropriate for lines and acts only on the document's lines.
50. From the **Actions** menu, select **Validate**. The confirmation message displays any error information.

51. On the **Confirmation** dialog box, click **OK**.
52. From the **Save** button, you can select **Save and Close**, which returns you to the **Overview** page, or you can click **Save**, which saves the current document but does not navigate away from this page. After it's saved, you can continue working on the document.
53. **DO NOT SUBMIT THE PURCHASE ORDER.** The **Submit** button initiates the processing for the document.
54. Click **Cancel**, and then **Yes** on the **Warning** dialog box.
55. Sign out of the application.

Practice Complete

You have successfully navigated the Procurement Cloud applications.

Practice 1- 3: Updating the PRC_ALL Role

The PRC_ALL role must be updated to ensure that later practices function correctly.

If you are in a course that is delivered live with an instructor, the instructor may have made the required update already. (The PRC_ALL role must be updated only once in a training environment.) Check with your instructor.

Overview

In this practice, you will add a role to the PRC_ALL role.

Prerequisites

Use Google Chrome version 62+ or Mozilla Firefox version 52+ to complete all demonstrations and practices in this training course.

User Login

prcXX.student, where XX is the number of your student user

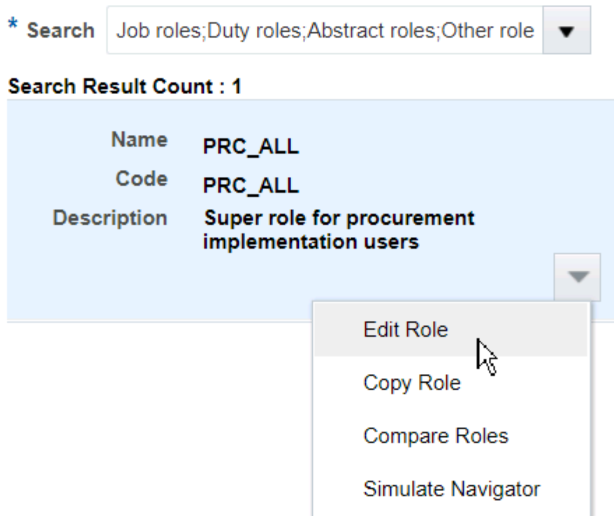
Restrictions

Only Training on Demand students should run this practice. Training on Demand students are *required* to run this practice.

Steps

1. Sign in to the application.
2. From the **Navigator**, under **Tools**, click the **Security Console** work area link.
3. On the **Security Console** page, select the **Roles** page.
4. On the **Roles** page, in the **Search** field, enter: `PRC_ALL`
5. In the table of search results, click **PRC_ALL**.

6. Click the down arrow button in the **PRC_ALL** tile in the Search Results and click **Edit Role**.



7. On the **Edit Role PRC_ALL: Basic Information** page, click the **4 Role Hierarchy** train stop.
8. On the **Edit Role PRC_ALL: Role Hierarchy** page, click **Add Role**.
9. In the **Add Role Membership** dialog box, search for: `Application Implementation Consultant`
10. Select the role named **Application Implementation Consultant** with Code **ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB**.
    Note: There are other roles with similar names. Be sure to match the job code given with the role you add.
11. Click **Add Role Membership**.
12. On the **Confirmation** dialog box, click **OK**.
13. In the **Add Role Membership** dialog box, click the **Close** (x) icon.
14. Click **Next**.
15. Click **Next** again.
16. Click **Save and Close**.
17. On the **Confirmation** dialog box, click **OK**.
18. Note: The new role won’t take effect for any signed-in user accounts until signed out and signed back in to the application.

Procedure Complete

You have added the Application Implementation Consultant role to PRC_ALL.

Activities for Lesson 2: Overview of Oracle Procurement Cloud

Demonstration 2-1: Exploring Oracle Applications Cloud Help

Overview

In this demonstration, you will access the Oracle Applications Help system.

Prerequisites

None

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. Sign in and click **Home** to navigate to the **Oracle Applications** home page.
2. Click your user image or name in the global header and select **Show Help Icons** from the **Settings and Actions** menu.
   This enables the display of help icons on all pages where available.
3. Note that the menu selection changes to **Hide Help Icons**.
4. From the **Navigator**, under **Others**, select **Worklist** to access the **Worklist: Notifications and Approvals** page.
5. Click the **Help** icon  next to the **Worklist: Notifications and Approvals** page header.
6. The **Worklist: Notifications and Approvals** help window opens. This window includes links to help topics that support the tasks you perform on the **Worklist: Notifications and Approvals** page.
7. You can expand or click links in the help window to show the beginning of a help topic. Click the **More** link at the end of the paragraph to show the remainder of the help topic in an expanded window.
8. You can use this help window to explore all help topics associated with the **Worklist** page.
9. To access additional help topics related to notifications and approvals, click the **More Help** link in the help window to open the Applications Help site in a new browser tab.
10. In the **Applications Help** site, you will see a list of the help topics available to support general user tasks in the applications. Results can be filtered by task, product, help type, and more.
11. Click the **Home** icon. Help is available for Procurement as well as other applications.
12. Click the **Procurement** icon to display the Procurement help dashboard.
13. To filter your results by product, click the **Product** menu. Expand **Procurement**, and then select the **Self Service Procurement** check box. Click **Apply**.

14. Click a topic title link to open the corresponding help topic. Notice that it opens in a new subtab.
15. Click the **Search Results** tab. The Product filter you applied in this tab is still applied.
16. Now explore one of the more interesting types of help: the video tutorial. Search on the following phrase: `placing an order`.
17. In the **Search Results**, click the **Placing an Order** link. A new subtab opens.
18. On the **Placing an Order** tab, the recorded video tutorial is ready to play. Click **Play**. After you have watched enough of the tutorial, pause the video and close the **Placing an Order** tab.
19. On the **Search Results** tab of the **Applications Help** site, click the **Navigator** icon in the global header. Then click the **Documentation Library** link. This opens a new browser tab and loads the Oracle Help Center, where you can view user guides, implementation guides, and so on. You accessed the Oracle Help Center and viewed Procurement guides in the previous lesson.
20. Close the **Oracle Help Center** and **Applications Help** browser tabs.
21. From the **Navigator** on the **Oracle Applications** home page, under **Procurement**, click the **Purchase Orders** work area link.
22. Open the **Tasks** panel and click **Create Order**.
23. In the **Create Order** dialog box, notice that the **Style** field label is underlined. Hover your mouse over the **Style** label. A short definition is displayed explaining what "Style" means in this context.
24. Review the definition for the **Style** field, and then click **Cancel**.
    While you are using the Oracle Procurement Cloud Applications to perform the activities in this course, look for other types of help that are embedded within the application pages.
25. Click **Home** in the global header to return to the Oracle Applications home page.

Demonstration Complete

You have successfully explored the Oracle Applications Help system.

Activities for Lesson 3: Introducing Functional Setup Manager

Demonstration 3-1: Opting In to an Offering and its Functional Areas and Features

Overview

In this demonstration you will:

- Use the **Opt In** feature to explore the procurement offering's functional areas and features, as applicable to your business requirements.
- Review and opt into the new features of your enabled offerings after your cloud applications is upgraded.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **My Enterprise**, select **Offerings**.
2. On the **Offerings** page, click the **Procurement** offering icon.
3. Click the **Opt In Features** button.

   On the **Opt In: Procurement** page, discuss the following:

   - The first line in the table applies to the offering and is enabled. This affects how the Functional Setup Manager generates setup tasks for your implementation.
   - All tasks needed to set up your selection are included in the automatically generated task list.
   - Tasks that are not needed by the offerings and options you have selected are excluded.
4. Click the **View All History** button to see who enabled the offering or made to the offering.
5. Click the **Done** button.

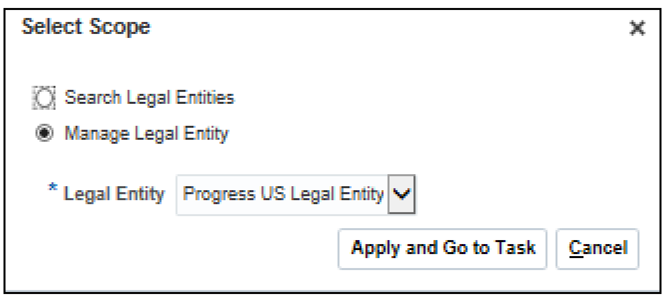
Explore the Offering

6. Click the **Features** icon on the **Procurement** offering row to see optional or alternative business processes that might apply to your implementation. On the **Edit Features: Procurement page**, some of the features may have other dependent features. You select progressively for those dependent features.
7. Click **Done**.

You are now ready to generate setup tasks and start implementing the offerings of your choice.

View Setup Tasks

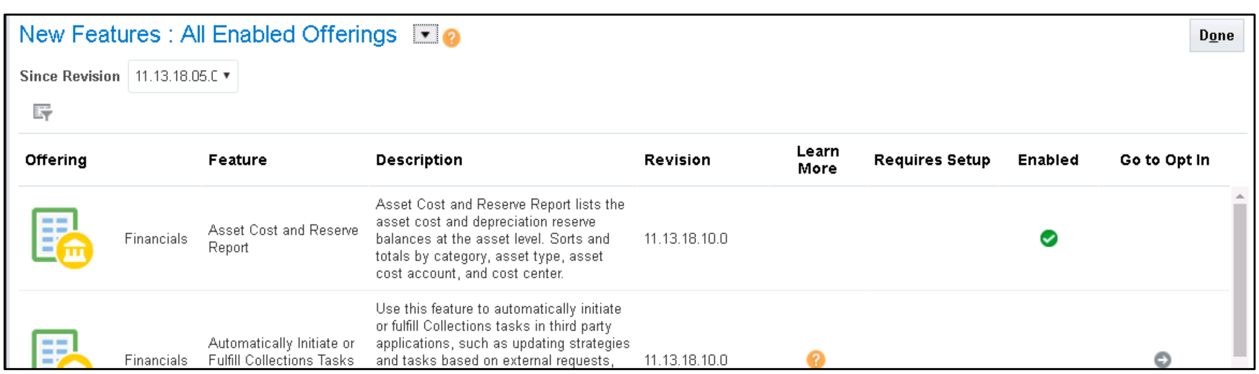
8. Click the **Setup** icon on the **Procurement** offering row.
9. On the **Setup: Procurement** page, select the **Legal Structures** functional area.
10. Click the **Shared** link to see the other offerings sharing the task.
11. Click **Done**.
12. In the **Legal Structures** section, from the **Show** list, select **All Tasks** to see both required and optional tasks.
13. In the **Manage Legal Entity** row, click the **Select…** link in the **Scope** column.
14. In the **Select Scope** dialog box, you can optionally limit the scope of the task to a particular legal entity. In this example, the scope is limited to the legal entity that you create or select to work within for your legal entity setup.



15. Click **Cancel**.

Reviewing and Opting into New Features after an Application Upgrade

16. From the **Actions** menu, select **Go to Offerings**.
17. On the **Offerings** page, click the **New Features** button.
18. On the **New Features: Procurement** page, select **All Enabled Offerings** from the drop-down list to see the new features that apply to your enabled offerings.



19. For one of the new features, click the **Go to Opt In** button.

    Note: If setup is required, the **Edit Features page** opens with more detailed features that can be enabled, and additional choices.

20. Click **Done**.

Demonstration Complete

You have successfully demonstrated how to opt into an offering and its functional areas and features.

Demonstration 3-2: Using the Rapid Implementation Task List

Overview

In this demonstration, you will create an implementation project with the procurement rapid implementation task list.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

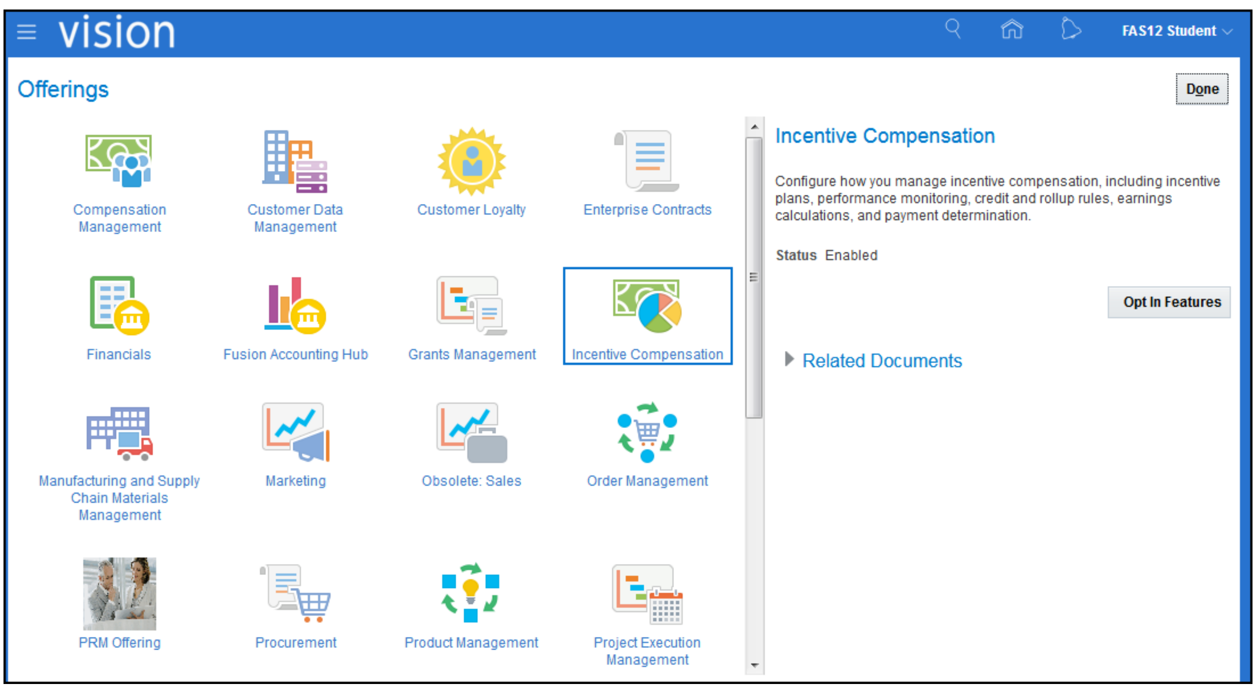
Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Disable the Incentive Compensation Offering

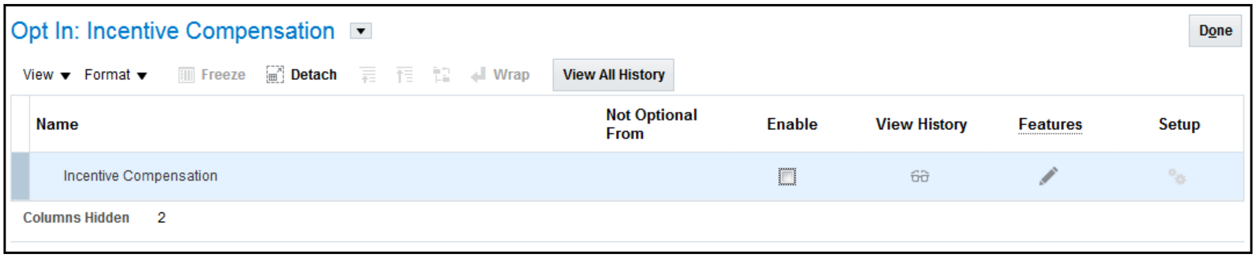
In the first part of this demonstration, you disable the Incentive Compensation offering. This is done as a workaround to allow Implementation Projects to be saved. The offering is re-enabled at the end of the demonstration.

1. In the **Navigator**, under **My Enterprise**, click the **Offerings** work area link.
2. Click the **Incentive Compensation** offering.



3. Click **Opt In Features**.

4. On the **Opt In: Incentive Compensation** page, deselect the **Enable** check box.



5. On the **Warning** dialog box, click **Yes**. This disables the offering.
6. Click **Done**.

Create an Implementation Project

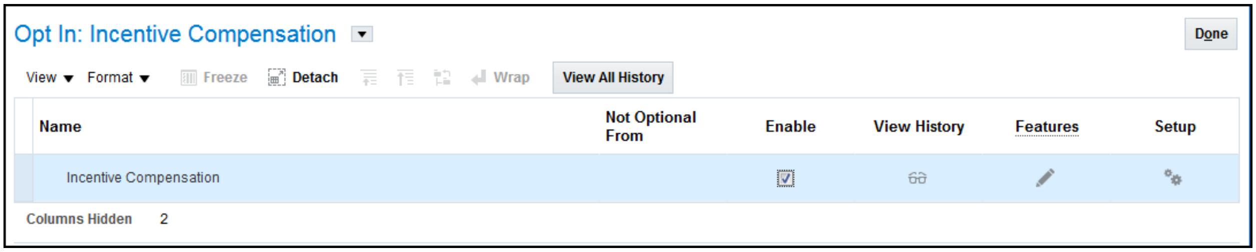
7. From the **Navigator**, under **Others**, select **Setup and Maintenance.**
8. On the **Setup** page, from the **Tasks** panel drawer, click **Manage Implementation Projects.**
9. On the **Implementation Projects** page, in the **Search Results** section, click the **Create** icon.
10. On the **Create Implementation Project** page, enter basic information for a project, such as name and dates.
11. Click **Next**.
12. Do not select any offerings on the **Create Implementation Project: Select Offerings to Implement** page.
13. Click **Save and Open Project**.
14. On the **Implementation Project** page, in the **Task Lists and Tasks** section, click the **Select and Add** icon.
15. On the **Select and Add: Task Lists and Tasks** page, from the **Search** list, select **Task lists**.
16. Search for the **Define Procurement Configuration for Rapid Implementation** task list, select it, and click **Done**.
17. On the **Implementation Project** page, expand the **Define Procurement Configuration for Rapid Implementation** folder.
18. Review the included task lists and tasks.

    Note that you can remove task lists from the project for any optional models or features. You can also remove or add individual tasks.
19. Click **Done.**
20. Click **Done** again to return to the **Setup** page.

Enable the Incentive Compensation Offering

21. To re-enable the Incentive Compensation offering, navigate back to the **Opt In: Incentive Compensation** page. Use the steps in the first section of this demonstration if needed.

22. Select the **Enable** check box to opt back in to Incentive Compensation.



23.

Demonstration Complete

You have successfully created a procurement rapid implementation project.

Practice 3-1: Browsing Offerings and Reviewing Related Documents

Overview

In this practice, you will gain an understanding of the Procurement offering and how to review related documents.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. From the **Navigator**, under **My Enterprise**, select **Offerings**.
2. Click the **Procurement** offering icon.

   Notice that the title in the side pane becomes **Procurement** and the description for the **Procurement** offering displays.
3. Notice that the **Status** of the Procurement offering is **Enabled**.
4. Expand the **Related Documents** link and view the **PDF, HTML** and **Excel** links for the following documents that provide more details about the offering:
   - **Associated Features** shows a list of features and functionality of this offering that can optionally be implemented.
   - **Setup Task Lists and Tasks** shows a complete list of all setup tasks, including prerequisites that should be performed to make this offering ready for transactions.
   - **Related Business Objects** shows a complete list of all setup data, including prerequisites that should be entered for this offering.
   - **Related Enterprise Applications** shows a list of all J2EE applications required to set up this offering.
5. Click the **Excel** link for **Setup Task Lists and Tasks** to download the document.
6. Review the document content and then close Excel to return to the **Offerings** page.
7. Recall that in Demonstration 3-1 the instructor showed how to use the **Opt In Features** button on this page to opt in to an offering and its functional areas and features.

Practice Complete

You have successfully opened the Offerings page, selected the Procurement offering, and reviewed related documents.

Practice 3-2: Accessing Task Lists and Tasks

Overview

In this practice you will be managing setup data by:

- Using the functional areas of an offering.
- Using an implementation project.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student, where XX is the number of your student user

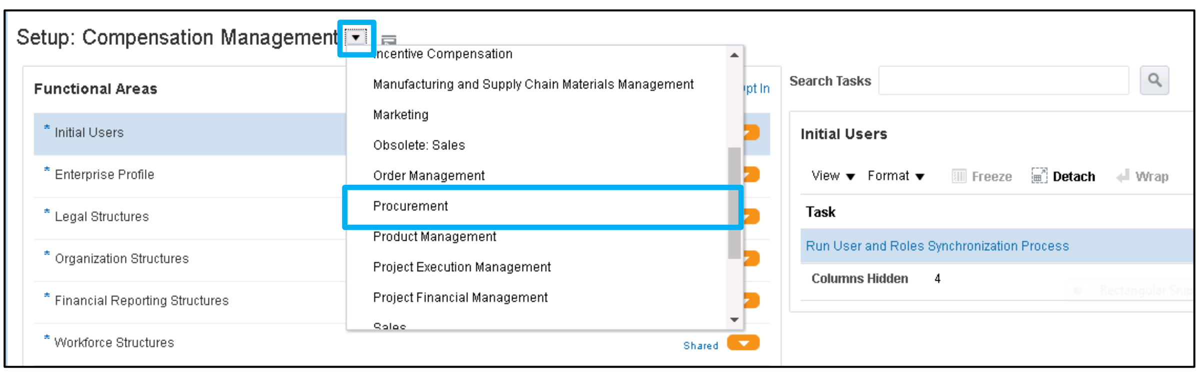
Steps

Managing Setup Data Using the Functional Areas of an Offering

1. From the **Navigator**, under **Others**, select **Setup and Maintenance.**
2. On the **Setup** page, select the **Procurement** offering.

   When the **Setup** page opens, it displays the first offering in an alphabetical list of all enabled offerings. In the environment used for this course, the first enabled offering in the list is the **Compensation Management** offering.

   To select the **Procurement** offering, click the **Down Arrow** button next to the page name, and select **Procurement** from the list.



   Setup page showing the navigation to select the Procurement offering.

3. Select the **Financial Reporting Structures** functional area.

Selecting Scope

4. In the **Specifying Ledger Options** task row, click the **Select…** link in the **Scope** column.
5. On the **Select Scope** dialog box, select **Specify Ledger Options**.
6. From the **Primary Ledger** list, select **Select and Add**.

7. Click **Apply and Go to Task**.
8. On the **Select and Add: Primary Ledger** page, **Primary Ledger** filter field enter: US.
9. On your keyboard, press **Enter.**
10. Select **US Primary Ledger**.
11. Click **Save and Close**. Ledger options you specify would now apply to only the **US Primary Ledger** because of the scope setting.
12. Click **Cancel**.
13. On the **Setup: Procurement** page, in the **Financial Reporting Structures** section, from the **Show** list, select **All Tasks**.
14. View the list of tasks and note that additional tasks in the **Financial Reporting Structures** functional area also have their scope set to **US Primary Ledger**.

Practice Complete

You have learned to manage setup data by using the functional areas of an offering.

Practice 3-3: Managing Setup Data with Bulk Entry Using CSV Files

Overview

In this practice, you will:

- Create CSV files from the Manage Business Unit task.
- View the CSV files created.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. From the **Navigator**, under **Others**, select **Setup and Maintenance.**
2. On the **Setup** page, select the **Procurement** offering.
3. Select the **Organization Structures** functional area.
4. If the **Actions** column is not visible, from the **View** menu, select **Columns** and then select **Actions**.
5. On the row for the **Manage Business Unit** task, click **Actions > Export to CSV File > Create New**.
6. On the **Export Setup Data to CSV File** page, change the **Process Name** and **Description** to: `PRCXX Manage Business Units` where XX represents the number of your student user.
7. In the **Business Unit: Scope** section, click **Add**.
8. On the **Select and Add** dialog box, search for and select **US1 Business Unit**.
9. Click **Save and Close**.
10. Click **Submit.**
11. On the **Confirmation** dialog box, click **OK**.
12. In the **Manage Business Unit** row, click **Actions > Export to CSV File > View All**.
13. On the **Export Setup Data to CSV File History: Manage Business Unit** page, click the **Refresh** icon as needed until the Status for your CSV file is **Completed successfully**.

    Note: There may be a warning message is telling you the application could not produce an XML file for some of the objects. This does not prevent you from completing the practice.
14. In the **PRCXX Manage Business Units** row, click **Actions > Download > CSV File Package**.
15. **Firefox users:** When prompted on the **Opening** dialog box, select **Open with**. From the **Open with** list, select **7-Zip File Manager**. Click **OK.**

Chrome users: A tile showing download progress appears in the browser. When download is complete, click the tile to open the file downloaded in 7-Zip.

Note: Normally you would download the file to local storage for editing. For class purposes we are not entering data - we just want to view the file.

16. Click **OK**.
17. Double-click on each CSV file to open it in Excel.
18. Close **Excel** and **Windows Explorer** or **7-Zip** if open.
19. On the **Export Setup Data to CSV File History** page, click **Done**.
20. On the **Setup: Procurement** page, next to **Manage Business Unit**, click **Actions > Import from CSV File > Create New**.

    Note: On the **Import Setup Data from CSV File** page, you would browse to find your updated CSV file, and import data from it. Because you did not input any new data, you have nothing to import.
21. Click **Cancel.**

Practice Complete

You have successfully created and viewed CSV files from the Manage Business Unit task.

Activities for Lesson 4: Common Application Configuration and Procurement

Demonstration 4-1: Reviewing Common Applications Configuration Tasks

Overview

This demonstration shows how to navigate to functional areas in the Procurement offering, view some of the functional areas for common applications configuration, and view the task lists and tasks for the functional areas.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Enterprise Profile** functional area.

   Note that the **Enterprise Profile** task list displays, and that **Required Tasks** is selected in the **Show** list.

   Also note that the **Manage Locations** task appears in the list of required tasks.
4. From the **Show** list, select **All Tasks**.

   Note that the **Manage Reference Data Sets** and **Manage Locations** tasks display in the task list, along with additional tasks.

   Also note that most of these tasks are discussed in more detail in the implementation guides referenced in the resources topic, in the course overview lesson.
5. Click the **Organization Structures** functional area.

   Note that the following required tasks are shown:

   - **Assign Business Unit Business Function**
   - **Manage Item Organizations.**

   Also note the following additional tasks:

   - **Manage Service Provider Relationships**
   - **View Service Clients**
6. Also note that most common application configuration tasks for the **Procurement** offering are contained in the first seven functional areas of the offering.

Demonstration Complete

You have navigated to the Procurement offering and viewed some of the common applications configuration functional areas and tasks.

Demonstration 4-2: Managing Locations

Overview

This demonstration shows how to add an address to a location.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Enterprise Profile** functional area.
4. Click the **Manage Locations** task.
5. On the **Manage Locations** page, in the **Name** field, enter: `Berlin`.
6. Click the **Search** button.
7. In the **Search Results** section click the **Berlin** link.
8. On the **Location: Berlin** page, note the following:
    - The **Status** field shows that this location is active. That means other workforce structures (such as departments) can use it.
    - This location is associated with an inventory organization. That means the location will be available for selection for use with purchase documents across all inventory organizations.
    - This is the location's main address. A location can have multiple addresses.
9. To add another address to this location, click the **Edit** button and then click **Correct**.
10. On the **Edit Location** page, click **Add Another Address** and then click the **Copy Main Address** button. It's located in the **Contact Details** section.
11. In the **Other Address** dialog box, in the **Street Name** field, enter: `Hamburgstrasse`.
12. In the **Street Number** field, enter: `57`.
13. Click **OK**.
14. Click **Submit**. On the **Warning** dialog box, click **Yes** and on the **Confirmation** dialog box, click **OK**.
15. Click **Done** to return to the **Setup: Procurement** page.

Demonstration Complete

You have added an address to a location.

Demonstration 4-3: Exploring Reference Data

Overview

This demonstration shows how to locate and review the reference data sets in the implementation of the Procurement offering.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Enterprise Profile** functional area.
4. From the **Show** list, select **All Tasks** and then click the **Manage Reference Data Sets** task.
5. On the **Manage Reference Data Sets** page, in the **Set Code** field, enter: `US`**.**
6. Click **Search**.
7. In the **Search Results** section, note the following:
    - The US1BUSET set code is the reference data set for the US1 business unit used by Vision Procurement.
    - The other sets are used by the Vision USA Inc. enterprise.
8. Click the **Cancel** button to return to the **Setup: Procurement** page.

Demonstration Complete

You have located and reviewed the reference data sets in the implementation of the Procurement offering.

Demonstration 4-4: Defining Business Units

Overview

This demonstration shows how to assign procurement and requisition business functions to business units in your implementation.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Navigate to the Manage Business Units Page

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Organization Structures** functional area.
4. Click the **Manage Business Unit** task.

Assign Procurement Business Unit Function

5. On the **Manage Business Units** page, click the **Create** icon.
6. On the **Create Business Unit** page, in the **Name** field, enter: `PRC Vision Manufacturing.`
7. From the **Default Set** list, select the **COMMON** reference data set.

   Hint: You might have to scroll the list or perform a search after entering `COMMON` in the **Reference Data Set Code** field.
8. Click **Save and Close**.
9. From the **Setup: Procurement** page, you will select the **Assign Business Unit Business Function** task and use it to assign all business functions that this business unit will perform.

   First, you must specify the business unit scope for your project if the scope is not already set.

   a. Click the **Select** link in the **Scope** column of the **Assign Business Unit Business Function** task.

   b. In the **Select Scope** dialog box, select **Assign Business Unit Business Function**.

   c. From the **Business Unit** list, select **Select and Add**.

d. Click the **Apply and Go to Task** button.

e. In the **Select and Add: Business Unit** dialog box, search for and select the row for **PRC Vision Manufacturing**. (Do not click the link.)

f. Click **Save and Close**.

10. On the **Assign Business Functions** page, select the **Enabled** check box for the **Billing and Revenue Management** business unit function to assign it to your new business unit.
11. Business functions that generate financial transactions require a primary ledger and a default legal entity.

    From the **Primary Ledger** list, and search for and select **US Primary Ledger** for the **US1 Legal Entity**.
12. Enable additional business unit functions. Set:

Payables Invoicing	Enabled
Payables Payment	Enabled
Procurement	Enabled
Receiving	Enabled

13. Click **Save and Close**.
14. On the **Setup: Procurement** page, note that **PRC Vision Manufacturing** is now shown as the selected business unit in the **Scope** column of the **Assign Business Unit Business Function** task.

    PRC Vision Manufacturing now has the Procurement business function.

Create PRC Vision Services Business Unit

Next, you will create a new business unit, PRC Vision Services, which will serve as a service client business unit. This business unit will have the requisitioning business function.

The service provider business unit, PRC Vision Manufacturing, will provide the procurement business function to PRC Vision Services.

15. On the **Setup: Procurement** page, click the **PRC Vision Manufacturing** link in the **Scope** column of the **Assign Business Unit Business Function** task.

Task	Scope
Manage Business Unit	
Assign Business Unit Business Function	PRC Vision Manufacturing

16. In the **Select Scope** dialog box, select the **Manage Business Unit** option. From the **Business Unit** list, select **Create New**, and then click **Apply and Go to Task**.
17. On the **Manage Business Units** page, click the **Create** icon.
18. In the **Name** field, enter: `PRC Vision Services`
19. Select the reference data set by searching for and selecting the **COMMON** set from the **Default Set** list.
20. Click **Save and Close**.

Assign Requisitioning Business Unit Function

21. On the **Setup: Procurement** page, click the **PRC Vision Manufacturing** link in the **Scope** column of the **Assign Business Unit Business Function** task.
22. In the **Select Scope** dialog box, select the **Assign Business Unit Business Function** option.
23. From the **Business Unit** list, choose **Select and Add**.
24. Click the **Apply and Go to Task** button.
25. In the **Select and Add** dialog box, search for and select the newly created **PRC Vision Services** business unit.
26. Click **Save and Close**.
27. On the **Assign Business Functions** page, set:

Billing and Revenue Management	Enabled
Requisitioning	Enabled
Primary Ledger	US Primary Ledger (for US1 Legal Entity)
Default Legal Entity	US1 Legal Entity (should default to this value)

28. Open the **Primary Ledger** list and select the **US Primary Ledger** for **US1 Legal Entity**.
29. Click **Save and Close**.

Define Service Provider Relationship

30. You will now define the service provider relationship.
31. On the **Setup: Procurement** page, from the **Show** list, select **All Tasks**.
32. Locate the **Manage Service Provider Relationships** task, and confirm that the link in the **Scope** column of this task is **PRC Vision Services**.
33. Click the **Manage Service Provider Relationships** task.
34. On the **Manage Service Providers** page, **Procurement Service Providers** section, click **Add Row** to add the business unit that will process requisitions on behalf of Vision Services.
35. On the **Search and Select: Procurement Service Providers** dialog box, in the **Name** field, enter: `PRC Vision Manufacturing`.
36. Click **Search**.
37. In the **Search Results**, select **PRC Vision Manufacturing**.
38. Click **Apply**.
39. Click **Done**.
40. Click **Save and Close**.
41. On the **Setup: Procurement** page, locate the **View Service Clients** task. Click the link in the **Scope** column – either **PRC Vision Services** or **Select Scope**.

42. In the **Select Scope** dialog, select the **View Service Clients** option, ensure **PRC Vision Manufacturing** (not PRC Vision Services) is selected from the **Business Unit** list, and then click the **Apply and Go to Task** button.
43. On the **Clients** page, note that **PRC Vision Services** is now listed as a procurement client of **PRC Vision Manufacturing**.
44. Click **Done**.

Demonstration Complete

You have assigned procurement and requisition business functions to business units in your implementation.

Demonstration 4-5: Managing Inventory Organizations

Overview

This demonstration shows how to review and edit inventory organization information.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Organization Structures** functional area.
4. Click the **Manage Inventory Organizations** task.
5. On the **Manage Inventory Organizations** page, in the **Organization** field, enter: `001`.
6. Click **Search**.
7. In the **Search Results** region, select the row for Organization 001, Organization Name Seattle and click the **Edit** icon.
8. On the **Edit Inventory Organization** page, in the **Basic Information** region, note the following:
    - The **Seattle** warehouse has **Usage** set as **Inventory management**.
    - **Name**, **Management Business Unit**, and **Legal Entity** are required fields.
9. Click **Next**.
10. On the **Manage Inventory Organization Parameters** page, note the following:
    - **Schedule, Item Master Organization,** and **Starting Revision** are required fields.
11. Click the **Cancel** button.
12. Click the **Done** button.

Demonstration Complete

You have reviewed, and learned how to edit, inventory organization information.

Practice 4-1: Creating a Location

Overview

In this practice, you will create a location.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Enterprise Profile** functional area.
4. Click the **Manage Locations** task.
5. On the **Manage Locations** page, click **Create**.
6. From the **Location Set** list, select **US Location Set**.
7. In the **Name** field, enter a unique location name based on your user name. For example, enter PRCXX Location, where XX is the number for your student user.
8. In the **Code** field, enter a code based on your user name, for example, `PRC11L`.
9. Enter the **Main Address**. Note that **City**, **State** and **Postal Code** are validated by the application. Set:

Country	United States
Address Line 1	500 Oracle Parkway
City	Redwood City
Postal Code	94065

10. Click **Submit**.
11. Click **Yes**, and then **OK** to the confirmation messages.
12. From the **Manage Locations** page, click **Done**.

Practice Complete

You have created a location.

Practice 4-2: Creating a Business Unit

Overview

You will create a business unit, assign business functions to it, configure reference data set assignments for it, and configure service provider relationships.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Practice 4-1: Creating a Location.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps:

Navigate to the Setup and Maintenance Work Area

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area.
2. On the **Setup** page, select the **Procurement** offering.

Define Your Business Unit

3. On the **Setup: Procurement** page, click the **Organization Structures** functional area.
4. Click the **Manage Business Unit** task.
5. On the **Manage Business Units** page, click the **Create** icon.
6. On the **Create Business Unit** page, in the **Name** field, enter the business unit name using your student username as the prefix. For example, enter `PRCXX Business Unit`, where XX is the number of your student user.
7. Select the **Location** you created. For example, enter `PRCXX Location`, where XX is the number of your student user.
8. Select the **Default Set** to **US1BUSET**.
9. Click **Save and Close**.

Assign Business Functions to Your Business Unit

10. On the **Setup: Procurement** page, in the **Organization Structures** functional area, find the **Assign Business Unit Business Function** task. Do not open the task.
11. On the row for the **Assign Business Unit Business Function** task, in the **Scope** column, click the **Select…** link.
12. In the **Select Scope** dialog, select **Assign Business Unit Business Function**, and then from the **Business Unit** list, choose **Select and Add**.
13. Click **Apply and Go to Task**.

14. In the **Select and Add: Business Unit** dialog, search for and select the row for your newly created business unit. For example, select PRCXX Business Unit, where XX is the number of your student user.
15. Click the **Save and Close** button.
16. On the **Assign Business Functions** page, click the check boxes to enable functions for your business unit. Set:

Materials Management	Enabled
Payables Invoicing	Enabled
Procurement	Enabled
Procurement Contract Management	Enabled
Receiving	Enabled
Requisitioning	Enabled

17. From the **Primary Ledger** list, select **US Primary Ledger** and **US1 Legal Entity** as the **Default Legal Entity**.
18. Click **Save and Close**.

Configure Set Assignments for Your Business Unit

19. On the **Setup: Procurement** page, click the **Organization Structures** functional area.
20. Click the **Manage Business Unit Set Assignment** task.

    Hint: To see the task you may have to select **All Tasks** from the **Show** list.
21. On the **Manage Set Assignments** page, set the **Reference Data Set Code** for various Reference Data Objects:

Reference Data Object	Reference Data Set Code
Dashboard Templates	COMMON
Departments	USDEPTS
Grades	COMMON
Jobs	COMMERCIALJOB
Locations	USLOCS
Performance Templates	COMMON

22. Click **Save and Close**.

Configure Service Provider Relationships

23. On the **Setup: Procurement** page, click the **Organization Structures** functional area.
24. Click the **Manage Service Provider Relationships** task.

    Hint: To see the task you may have to set the **Show** field to **All Tasks**.
25. On the **Manage Service Providers** page, in the **Procurement Service Providers** section, click **Add Row**.

26. On the **Search and Select: Procurement Service Providers** page, search for business unit **US1 Business Unit**, select the row, click **Apply**, and click **Done**.
27. Click **Save and Close**.

Practice Complete

You have created a business unit, assigned business functions to it, configured reference data set assignments for it, and configured service provider relationships.

Practice 4-3: Creating an Inventory Organization

Overview

You will create an inventory organization.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Practice 4-1: Creating a Location, and Practice 4-2: Creating a Business Unit.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Organization Structures** functional area.
4. Click the **Manage Inventory Organizations** task.
5. On the **Manage Inventory Organizations** page, click the **Create** icon.
6. On the **Create Inventory Organization** page, in the **Name** field, enter an organization name based on your username. For example, use `PRCXX Org`, where XX is the number of your student user.
7. In the **Organization** field, Enter an organization code, such as `PRCXXO`, where XX is the the number of your student user.
8. Set:

Management Business Unit	Your business unit
Legal Entity	US1 Legal Entity
Location Address > Name	Your location

9. Click **Next**.
10. On the **General** tab, set:

Schedule	Operations
Item Master Organization	Your inventory organization

11. Select the **Lot, Serial Number, and Packing Unit** tab.
12. In the **Lot Control Section**, from the **Generation** list, select **At item level**.
13. In the **Serial Number Generation** section, set:

Uniqueness	Unique within inventory items
Generation	At organization level

Starting serial number	1

14. Click **Save and Close**.
15. Click **Done**.

Practice Complete

You have created an inventory organization.

Activities for Lesson 5: Securing Oracle Procurement

Demonstration 5-1: Managing Procurement Agents

Instructor Note: The instructor should demonstrate Practice 5-1: Managing Procurement Agents for this demonstration.

Practice 5-1: Managing Procurement Agents

Instructor Note: The instructor should demonstrate this practice first, as Demonstration 5-1.

Overview

As part of configuring the application, you will configure your user as a procurement agent.

NOTE: Student and instructor users must be configured as procurement agents in this practice to successfully complete the activities in the remaining lessons of this course.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Students: To complete this practice successfully, you must first complete Practice 4-2: Creating a Business Unit.

Instructor: To complete this demonstration successfully, you must first complete Demonstration 4-4: Defining Business Units.

User Login

Students: Use prcXX.student, where XX is the number of your student user.

Instructor: Use prc00.instructor.

Steps

Navigate to the Manage Procurement Agents Page

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, select the **Procurement Foundation** functional area.
4. Select the **Manage Procurement Agents** task.

   Note: Use the version of the task that does not have the **Select Scope** link.

Configure User as a Procurement Agent for Your Procurement BU

5. On the **Manage Procurement Agents** page, click the **Create** icon.
6. On the **Create Procurement Agent** page, from the **Procurement BU** list, select the name of the business unit you created for your Procurement BU in an earlier practice. For example,
   - For student users select: **PRCXX Business Unit**, where XX is the number of your student user. For example, for student user **prc15.student**, you might select PRC15 Business Unit.
   - For the instructor user enter: **PRC Vision Manufacturing**.

7. In the **Agent** field, enter your username in the format: last, first. For example,
   - For a seeded student user such as **prc11.student**, you might enter: **Student, PRC11**.
   - For the seeded instructor user, enter: **Instructor, PRC00**.

   Tip: Use the **Search** function to locate the precise name for your user.
8. Update the **Agent Access** section. Note: All **Actions** should already be set to **Allowed**, so no update is needed for those values. Set:

Action	Allowed	Access to Other Agent's Documents
Manage Requisitions	Enabled	Full
Manage Purchase Orders	Enabled	Full
Manage Purchase Agreements	Enabled	Full
Manage Negotiations	Enabled	Full
Manage Sourcing Programs	Enabled	None
Manage Catalog Content	Enabled	Not Applicable
Manage Suppliers	Enabled	Not Applicable
Manage Supplier Qualifications	Enabled	Full
Manage Approved Supplier List Entries	Enabled	Not Applicable
Analyze Spend	Enabled	Not Applicable

9. Click **Save and Close**.
10. In the **Confirmation** dialog box, click **OK**.

Set Up User as Procurement Agent for US1 Business Unit

11. Click the **Create** icon.
12. Repeat the above steps to define the same options for your user, but this time for **US1 Business Unit**.
13. On the **Manage Procurement Agents** page, click **Done**.

Practice Complete

You have set up your user as a procurement agent in two business units.

Practice 5-2: Copying a Role

Overview

In this practice, you will copy a role.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

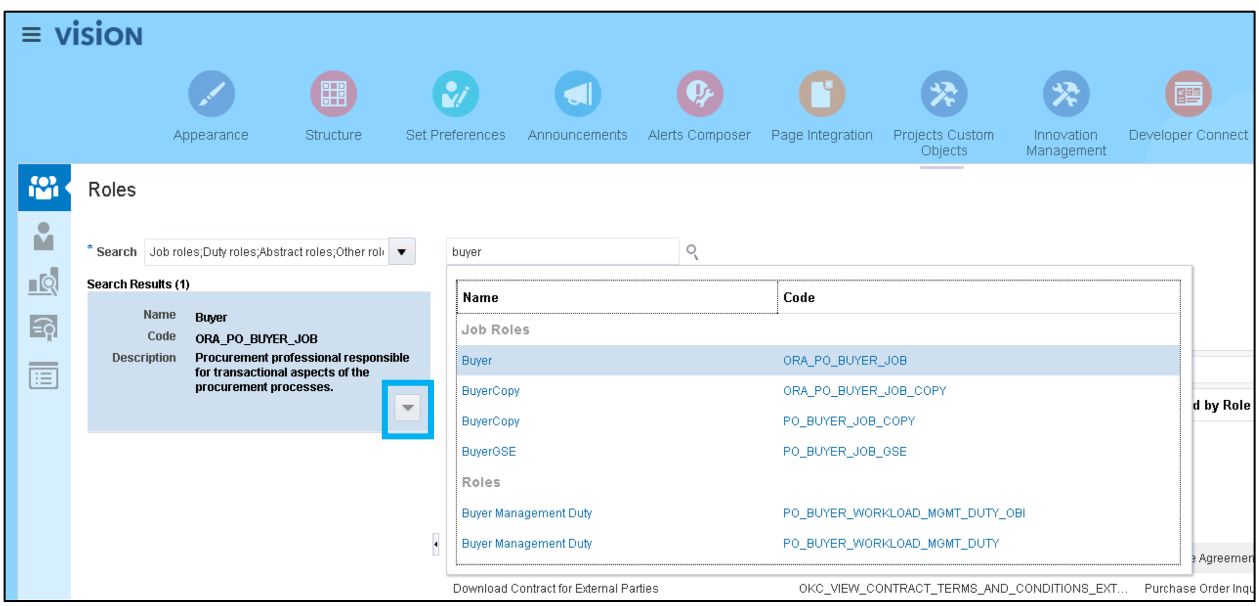
User Login

prcXX.student, where XX is the number of your student user

Steps

Copy a Role

1. From the **Navigator**, under **Tools**, select **Security Console**.
   If you see a **Warning** dialog box, click **OK** on it.
2. In the **Security Console**, on the **Roles** tab, click the drop-down arrow next to the **Search** field. Note that you can use the drop-down menu to change search parameters. Leave the search parameters as they are.
3. In the search entry field enter: **`buyer`**.
4. Click the **Search** icon. A number of tiles are displayed in the search results. Each of these tiles has multiple attributes: **Name, Code** and **Description**.
5. In the search results, locate the tile with the predefined job role **Buyer** that has a **Code** field of **ORA_PO_BUYER_JOB**.
6. Click the drop-down arrow in the **Buyer** tile and select **Copy Role**.



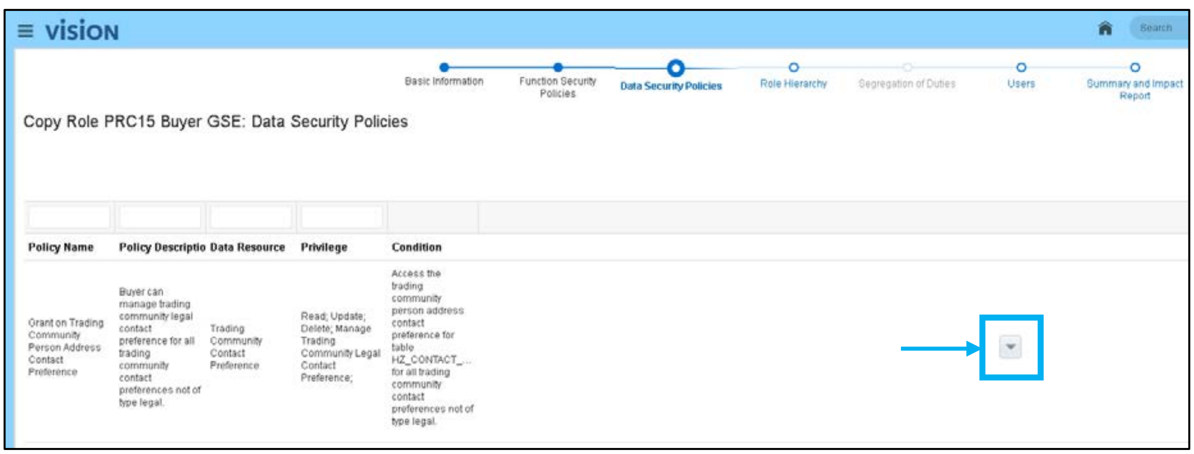
7. In the **Copy Options** dialog box, select **Copy top role.**

8. Click **Copy Role**.
9. Insert PRCXX (where XX is the number of your student user) to the beginning of the existing role name in the **Role Name** field. Include a space after PRCXX, before the existing role name. For example, for student 15, set the role name to `PRC15 BuyerGSE`.
10. Insert PRCXX_ (where XX is the number of your student user) to the beginning of the existing role code in the **Role Code** field. Include the underscore, but no spaces, for example, PRC15_PO_BUYER_JOB_GSE.

11. Click **Next** and then click **Next** again.

Update the Security Policy Configuration for the New Role

12. On the **Copy Role: Data Security Policies** page, locate the policy row with the **Policy Name** of **Grant on Trading Community Person Address Contact Preference.**
13. Click the **Actions** drop-down arrow for this row and select **Remove Data Security Policy**.



14. On the **Warning** dialog box, click **Yes** to confirm removal of the security policy.
15. In the top policy row, click the **Actions** drop-down arrow and select **Edit Data Security Policy**.
16. Review the data and click **OK** without making any changes.
17. Click **Next**.
18. On the **Copy Role: Role Hierarchy** page, review the hierarchy.
    a. Click the **Show Graph** button to view a graphical view of the.
    b. Click the **View as Table** button to return to the table view of the hierarchy.
19. Click **Next**.
20. On the **Copy Role: Users** page, click **Add User**.
21. In the **Add User** dialog box, search for and select the value for your student user.

22. Click **Add User to Role**.
23. On the **Confirmation** dialog box, click **OK.**
24. In the **Add User** dialog box, the **Close** icon.
25. Click **Next**.
26. On the **Copy Role: Summary** page, review the summary report.

    In the **Data Security Policies** section, click the **Expand** (triangle) button to expand the view. Review the **Actions** for each policy. One is changed and one is removed.
27. Click **Submit and Close**.
28. Click **OK** on the **Confirmation** dialog box.

Practice Complete

You have successfully copied a role and assigned your student user to it.

Practice 5-3: Comparing a Role

Overview

In this practice you will be comparing the copied role you created in the prior practice to the original **Buyer** role.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

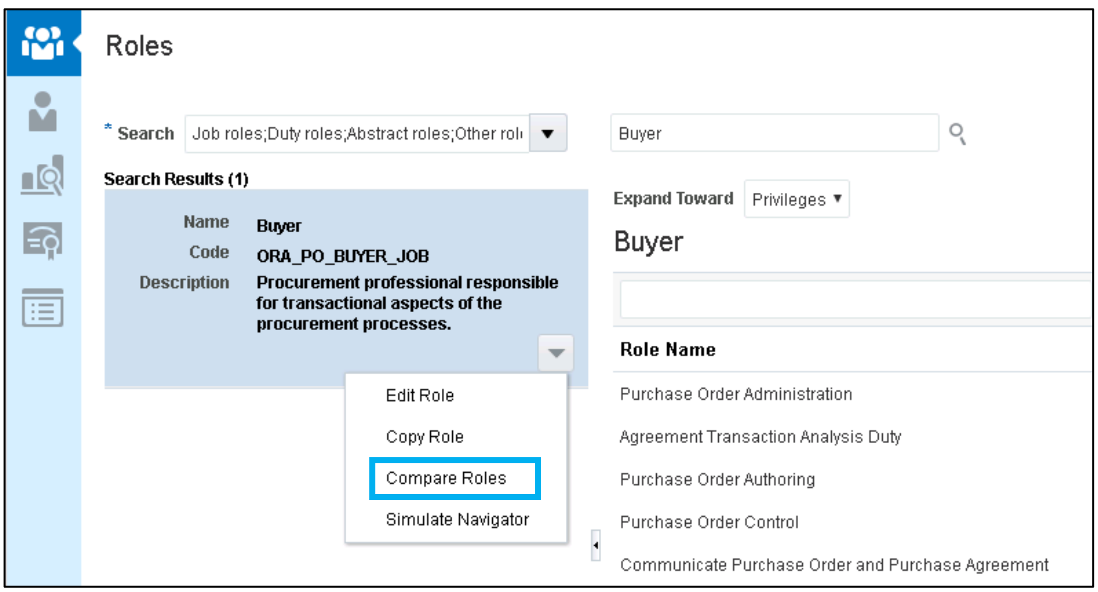
Practice 5-2: Copying a Role

User Login

prcXX.student, where XX is the number of your student user

Steps

1. From the **Navigator**, under **Tools,** select **Security Console**.
2. In the **Security Console**, on the **Roles** tab, search for and select the **Buyer** role.
3. In the **Search Results**, click the drop-down arrow in the **Buyer** role tile, and select **Compare Roles.**



4. On the **Compare Roles** page, click the **Search** icon for the **Second Role** field.
5. In the **Search Roles** dialog box, in the **Search** field, enter your copied buyer role (the one for which you prepended PRCXX to the role name, where XX is the number of your student user). Select your role.
6. Click **OK**.
7. In the **Filter Criteria** drop-down menu, deselect **Function security policies**.
8. Click **Compare.**

9. In the results table, review the similarities and differences between the two roles. You should see the changes made in **Practice 5-2: Copy a Role** reflected in the results.
10. Click **Done.**

Practice Complete

You have compared two roles.

Activities for Lesson 6: Defining and Managing Approvals

Demonstration 6-1: Managing Task Configurations

Overview

Use the Manage Task Configurations for Procurement task to access the Oracle BPM Worklist. In the Worklist Tasks to be configured pane, review the predefined requisition approval task and review its details.

Two approval tasks are used in Oracle Procurement Cloud:

- **Document Approval:** All procurement documents
- **ReqApproval:** All requisitions

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Approval Management** functional area.
4. Click the **Manage Task Configurations for Procurement** task to open **Oracle BPM Worklist**. **Hint:** From the **Show** list, select **All Tasks**.
   Oracle BPM Worklist opens in a new browser tab labeled BPM Worklist.
5. In **Oracle BPM Worklist**, click the **Task Configuration** button.
6. In the **Tasks to be configured** panel, search for the **ReqApproval** task. **Hint:** Searches in this panel are case sensitive.
7. Click the **ReqApproval** task.
8. Click the **Configuration** tab. Note the policies selected for **Assignment and Routing Policy**.
9. Click the **Assignees** tab. Review changes you could make in the **Assignees** section.

   Note that you can change the graphical flow from horizontal to vertical by clicking **Switch to Vertical Layout**. Click **Switch to Horizontal Layout** to change the graphical flow back from vertical to horizontal.
10. Click the **Header Hierarchy** policy icon in the **Header Stage**. Hint: It may be easier to locate from the vertical layout view of the **Assignees** tab.

11. Click the **Go to rule** icon in the **Header Hierarchy** policy icon and then click the **Go to rule** button that appears. From here, you can view list builder rule sets and conditions.
12. Find the **Requisition Self Approval under 50K** rule. **Hint:** Use the rule navigation control to find the rule. The control initially is set to **1-5 of 14**. Select a different range, or click **Next** to view more rule sets and conditions.
13. Note the following:
    - The **Requisition Self Approval under 50K** rule allows self-approval for requisitions with amounts up to $50,000.
    - The **Requisition Supervisory 50k** rule dictates that the supervisory hierarchy will be used to approve requisition amounts equal to or greater than $50,000.
14. Click a rule's **Expand** icon to view its IF/THEN logic.
15. Enter edit mode by clicking the **Edit task** icon (located in the **Tasks to be configured** section).
16. While in edit mode, the available controls include:
    - **Reset** icon: all changes that have not been *committed (i.e. deployed)*, saved or not, are discarded.
    - **Save** icon: saves your changes. Changes are retained even if you sign out, but are not yet deployed and have no effect.
    - **Commit task** icon: deploys your saved changes so that they are in effect.
17. **Important!** If you made any changes to the rules, click the **Reset** icon.
18. Close the **BPM Worklist** browser tab and return to Setup and Maintenance.

Information: *If the task is not predefined as rule-based, then the behavior does not need to be changed, and you get a message stating that you cannot edit the task. Technical administrators can still edit the task in Oracle BPM Studio, which is an add-in to Oracle JDeveloper*.

Demonstration Complete

You have reviewed the predefined requisition approval tasks in Oracle BPM Worklist.

Demonstration 6-2: Managing Approval Groups by Using the BPM Worklist Application

Overview

Use the Manage Approval Groups for Procurement task to access the Oracle BPM Worklist and review approval groups. In the Groups pane, review the Category Servers group.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Approval Management** functional area.
4. Click the **Manage Task Configurations for Procurement** task to open **Oracle BPM Worklist**.
5. Click the **Approval Groups** button in **Oracle BPM Worklist**.
6. In the **Groups** pane, click the **CategoryApprovalGroup** group.
7. Note that for Vision, all purchasing documents will self-approve. In the **Members** section, there is a member icon for tiffany.irving. Any requisitions submitted will be assigned to her. All other requisitions over $50,000 will be routed to the requester's supervisor.
8. The **Create Approval Group** button in the **Groups** pane is used to create a new group. Instead, you will add additional approvers to the existing **CategoryApprovalGroup** group.
9. In the **Members** section, click the **Add** icon.
10. The **Add to Group** dialog box opens.
11. In the **Member** field, enter: `calvin.roth`.
12. Click **OK**.
13. Note that calvin.roth was added to the approval group.
14. Click **Revert**.
15. Close the **Oracle BPM Worklist** browser tab.

Demonstration Complete

You have reviewed approval groups in Oracle BPM Worklist.

Demonstration 6-3: Creating a Nested Condition

Overview

Use Setup and Maintenance to go to the Manage Requisition Approvals task.

Create a nested condition for the auto-approval of requisitions less than $5,000 created US1 Business Unit or another business unit.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Approval Management** functional area.
4. Click the **Manage Requisition Approvals** task.
5. Select the row with a **Stage** value of **Header Stage** and **Participant** value of **Header Consensus**.

Create a New Rule

6. Click the **Edit Rules** button (*not* Edit Rules in BPM).
7. In the **Rules** section, click the **Create** icon to create a new rule.
8. In the **Create Rule** dialog box, set:

Rule	`Auto Approve Requisitions Less than 5000`
Description	`Auto-approve requisitions less than 5000`

9. Click **OK.**

Create a Condition

10. We want our rule to apply to requisitions less than $5,000 in value. In the **Conditions** section, click **Actions > Add Condition**.
11. In the **Add Condition** dialog box, set:

Task	Approval task attribute
Attribute	Requisition Amount

Operator	Less than
Value Type	Value
Value	5000

12. Click **OK**.

Create a Second Condition

13. We want more than a single condition to be true for the rule to apply. We'll use a logical AND to do this. Make sure the **Requisition Amount Less than 5000** condition row is selected, so that additional operators you are about to add appear in the correct place.
14. Click the **Add Operator** button and select **As Parent** from the menu.
15. On the **Add Operator** dialog box, leave the **Operator** list set to **AND** click **OK**.
16. Notice the operator **AND** appears as the first node in the condition.
17. Next, you will add another operator for the condition. Make sure the **Requisition Amount Less than 5000** condition row is selected in the condition table.
18. Click the **Add Operator** button and select **As Child** from the menu.
19. In the **Add Operator** dialog box, from the **Operator** list, select **OR**.
20. Click **OK**.
21. We want the rule to apply to requisitions under $5,000 in either the **US1 Business Unit**, *or* the **UK business unit**. Select the **OR** condition row.
22. Click the **Add Condition** button and select **As Child** from the menu.
23. In the **Add Condition** dialog box, set:

Type	Approval task attribute
Attribute	Requisitioning BU Requisition Header
Operator	Equals
Value Type	Value
Value	US1 Business Unit

24. Click **Add Another**.
25. In the **Add Condition** dialog box, set:

Type	Approval task attribute
Attribute	Requisitioning BU Requisition Header
Operator	Equals
Value Type	Value
Value	UK Business Unit

26. Click **OK**.

Create an Action to Approve the Requisition if it Matches the Conditions

27. In the **Actions** section, click **Add Action.**

28. In the **Edit Action 1** dialog box, from the **Action Type** list, select **Automatic**.
29. Leave the **Set Outcome To** list set to **Approved**.
30. Click **OK**.
31. Click **Save**. In the **Rules** section, notice that the **Conditions** column for our rule is "Requisition Amount Less than 5000 AND (Requisitioning BU Equals US1 Business Unit OR Requisitioning BU Equals UK Business Unit)". This expresses the logic we want for the rule.
32. Click **Save and Close**.
33. Click **Done**.

Demonstration Complete

You have created Requisition Approval conditions.

Demonstration 6-4: Creating User-Defined Attributes

Overview

Use Setup and Maintenance to go to the Manage Requisition Approvals task.

In this demonstration, you will create a User-Defined Attribute.

The Procurement Category Hierarchy Setup contains Computers as a parent category of multiple purchasing categories including Laptops, Desktops, and Servers. For this demonstration, create a User-Defined Attribute that dictates if the requisition contains any lines associated with these purchasing categories and the Computer spend is greater than $10,000, then the requisition will be routed three levels up the requester's supervisory hierarchy.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Approval Management** functional area.
4. Click the **Manage Requisition Approvals** task.
5. Click **Manage User-Defined Attributes**.
6. Click the **Create** icon.
7. In the **Create User-Defined Attributes** dialog box, in the **User-Defined Attribute** field, enter: `Total Computer Spend`.
8. From the **Type** list, select **Summation**.
9. From the **Attribute** list, select **Approval Amount**.
10. In the **Filters** section, create a filter. Set:

Match Using	Hierarchy
	Category Name
Rolls up to	`Computers`

11. Click **OK**.
12. Click **Done**.

13. Next, you will set up approval routing rules. Select the row with a **Stage** value of **Header Stage** and **Participant** value of **Header Consensus**.
14. Click **Edit Rules**.
15. In the **Rules** section, click **Create**.
16. In the **Create Rule** dialog box, in the **Rule** field, enter: `Computer Total Spend`.
17. In the **Description** field, enter: `Computer Spend`.
18. Click **OK**.
19. Now you will create a condition for the new rule. In the **Rules** section, make sure the new **Computer Total Spend** rule is selected.
20. In the **Conditions** section, click **Add Condition**.
21. In the **Add Condition** dialog box, set:

Type	User-defined attribute
Attribute	Total Computer Spend
Operator	Greater than
Value	`10000`

22. Click **OK**.
23. In the **Actions** section, click **Add Action**.
24. In the **Edit Action** dialog box, set:

Action Type	Approval Required
Route Using	Supervisor Hierarchy
Number of Approval levels	3
Top Worker in Hierarchy	`Kennedy, Anita`

25. Click **OK**.
26. Click **Save and Close**.
27. The rule you created is not active until it is deployed. Click **Deploy**.
28. In the **Confirmation** dialog box, click **OK**.
29. Click **Done**.

Demonstration Complete

You have created a User-Defined Attribute.

Demonstration 6-5: Creating a Condition with Category Hierarchy

Overview

Use Setup and Maintenance to go to the Manage Requisition Approvals task. Create a condition to route requisitions in the IT category hierarchy requisitions to the IT Manager.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the Navigator, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Approval Management** functional area.
4. Click the **Manage Requisition Approvals** task.
5. Next, you will set up approval routing rules. Select the row with a **Stage** value of **Header Preapproval Stage** and **Participant** value of **Preapproval Header Consensus**.
6. Click **Edit Rules**.
7. Click **Create**.
8. In the **Create Rule** dialog box, in the **Rule** field, name the rule: `Facilities Manager Furniture Approval`.
9. In the **Description** field, enter: `Facilities manager must approve all furniture purchases`.
10. Click **OK**.
11. Make sure the new rule **Facilities Manager Furniture Approval** is selected in the **Rules** section.
12. In the **Conditions** section, click **Add Condition**.
13. In the **Add Condition** dialog box, set:

Type	Approval Task Attribute
Attribute	Procurement Category Hierarchy Level 1
Operator	Is not blank

14. Click **OK.**

15. In the **Facilities Manager Furniture Approval: Details** section, click **Add Condition**, and then click **Below** from the menu.
16. In the **Add Condition** dialog box, set:

Type	Approval Task Attribute
Attribute	Procurement Category Hierarchy Level 1
Operator	Equals
Value Type	Value
Value	Enter `Office Furniture` and select **Office Furniture**.

17. Click **OK.**
18. Make sure the new Procurement Category Hierarchy Level 1 Equals Office Furniture condition is selected.
19. In the **Actions** section, click **Add Action**.
20. In the **Edit Action** dialog box, set:

Action Type	Approval Required
Route Using	Single Approver
User Type	Worker
Worker	Enter `Roth, Calvin` and select **Roth, Calvin**.

21. Click **OK**
22. In the **Rules** section, click **Create**.
23. In **Create Rule** dialog box, in the Rule field, enter: `Auto Approve`.
24. Add the description `To complete rule if no office furniture included in requisition`.
25. Select **Rule Always Applies**.
26. Click **OK**.
27. Make sure the new **Auto Approve** rule is selected.
28. Click **Add Action**.
29. In the **Edit Action** dialog box, set:

Action Type	Automatic
Set Outcome To	Approved

30. Click **OK.**
31. Click **Save and Close**.
32. Click **Deploy**.
33. In the **Confirmation** dialog box, click **OK**.
34. Click **Done**.

Demonstration Complete

You have created Requisition Approval conditions.

Activities for Lesson 7: Setting Up Procurement - Common Functions

Demonstration 7-1: Defining a Supplier Business Classification Lookup

Overview

This demonstration shows how to enter a supplier business classification lookup.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Suppliers** functional area.
4. From the **Show** list, select **All Tasks**.
5. Click the **Manage Business Classification Lookup** task.
6. To add a new browsing category, on the **Manage Business Classification Lookup** page, click the **Add** icon in the **POZ: Business_Classifications: Lookup Codes** section.
7. In the open row in the table, set:

Lookup Code	`PRC_COMPUTER_CONSULTING`
Display Sequence	Enter your instructor number (`00`).
Start Date	Enter today's date.
Meaning	`PRC Computer Consulting Services`
Description	`PRC class business classification lookup`

8. Click **Save and Close**.

Demonstration Complete

You have entered a supplier business classification lookup.

Demonstration 7-2: Defining a Products and Services Hierarchy

Overview

This demonstration shows how to add a browsing category, and move an item category within a products and services hierarchy.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Suppliers** functional area.
4. Click the **Manage Supplier Products and Services Category Hierarchy** task.
   Hint: To see the task you may need to select **All Tasks** from the **Show** list.
5. On the **Manage Supplier Products and Services Category Hierarchy** page, select the **Root Category** row.
6. Click the **Create** icon to add a new browsing category.
7. In the **Create Browsing Category** dialog box, enter the category name: `PRC Hardware`**.**
8. Optionally, provide a **Description**.
9. Click **Save and Close**.
10. On the **Other** row, click the **Expand** icon to display the row's contents.
11. Click the **StdFasteners** row.
12. Click the **Move** button.
13. In the **Move Category** dialog box, in the **Parent Category** field, enter and select the new browsing category that you created: `PRC Hardware`.
14. Click **Save and Close**.
15. On the **PRC Hardware** row, click the **Expand** icon to display the row's contents.
    Notice that the StdFasteners item category has been moved to the PRC Hardware browsing category.
16. Click **Done**.

Demonstration Complete

You have added a browsing category into a products and services hierarchy, and moved an item category into the new browsing category.

Demonstration 7-3: Defining Payment Terms

Overview

This demonstration shows how to create a payment term with a discount.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
4. Click the **Manage Payment Terms** task.

   Note: If you see two versions of the Manage Payment Terms task, use the one that does not have a Select link in the Scope column.

Create the Payment Term

5. On the **Manage Payment Terms** page, click the **Create** icon.
6. On the **Create Payment Terms** page, set:

Name	`PRC_XX Term` where XX is your instructor number.
Description	`Net in 90 days. Discount for payment in 30 days.`

Create the Discounts

7. In the **Installments** section, click the **Add** icon to create a new row.
8. Set:

Due %	`100`
Days	`90`

9. In the **Discount** section, under the **First Discount** table header, set:

Discount %	`10`
Days	`30`

10. In the **Set Assignments** section, click the **Add** icon to create a new row.
11. From the **Set Code** list, select **COMMON**.
12. Click **Save and Close**.
13. Click **Done**.

Demonstration Complete

You have created a payment term with a discount.

Demonstration 7-4: Creating a Purchasing Line Type

Overview

This demonstration shows how to create a purchasing line type.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
4. Click the **Manage Purchasing Line Types** task.
   Hint: To see the task you may need to select **All Tasks** from the **Show** list.
5. On the **Manage Purchasing Line Types** page, click the **Add Row** icon.
6. Set:

Line Type	`PRC Computer Goods`
Description	`PRC special order computer goods`
Code	`PRCSOCGoods`
Purchase Basis	`Goods`
Category Name	`Computer Supplies`
UOM	`Ea`

   Leave the remaining fields empty.

7. Click **Save and Close**.

Demonstration Complete

You have created a purchasing line type.

Demonstration 7-5: Configuring a Procurement Business Function

Overview

This demonstration shows how to configure the procurement business function for a business unit.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this demonstration successfully, you must first complete demonstrations 4-4: Defining Business Units, 5-1: Managing Procurement Agents, and 7-5: Creating a Purchasing Line Type.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
4. Click the **Configure Procurement Business Function** task.
5. In the **Specify Procurement BU** dialog box, from the **Procurement BU** list, select **PRC Vision Manufacturing**, and click **OK**.
6. In the **General** section, set:

Payment Terms	`End of Month`
Buyer	Your login user. For example, search for `Instructor, PRC00`.
Inventory Organization	`Seattle`
Line Type	Use the line type you previously defined, for example, `PRC Computer Goods`
Currency	`USD`

   Leave the other fields blank or accept the default.

7. In the **Purchasing** section, set:

Maximum File Size Megabytes	`100`
Default promised date from	Selected

requested date	

8. In the **Sourcing** section, set:

Rank Indicator	`Best or trailing`
Display best price in blind negotiations	Selected

9. Click **Save and Close**.
10. In the **Confirmation** dialog box, click **OK**.

Demonstration Complete

You have configured the procurement business function for a business unit.

Demonstration 7-6: Managing Common Options for Payables and Procurement

Overview

This demonstration shows how to review the setup for the **Common Options for Payables and Procurement** task.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
4. Click the **Manage Common Options for Payables and Procurement** task.
5. **Hint:** To see the task you may need to select **All Tasks** from the **Show** list. On the **Manage Common Options for Payables and Procurement** page, from the **Business Unit** list, select **US1 Business Unit**.
6. Discuss the following:
   - Expense Accruals
   - Self-Billed Invoices
   - Legal Entity Information
7. Click **Cancel**.

Demonstration Complete

You have reviewed the setup for the **Common Options for Payables and Procurement** task.

Practice 7-1: Configuring Your Business Unit

Overview

You will perform some additional Procurement-specific configuration tasks required to use your procurement business unit to enter transactions.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 4-1: Creating a Location, practice 4-2: Creating a Business Unit, practice 4-3: Creating an Inventory Organization.

User Login

prcXX.student, where XX is the number of your student user.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
4. Click the **Configure Procurement Business Function** task.

Configure Procurement Business Function for Your BU

5. In the **Specify Procurement BU** dialog box, select the business unit you created earlier. For example, select `PRCXX Business Unit`, where XX is the number of your student user. Then click **OK**.
6. On the **Configure Procurement Business Function** page, in the **General** section, enter:

Inventory Organization	`PRC XX Org`, where XX is the number of your student user.
Currency	`USD`
Buyer	Your student user name. For example: `Student, PRCXX` where XX is the number of your student user.
Line Type	Use the line type you previously defined, for example, `PRC Computer Goods`
Currency	`USD`

7. In the **Purchasing** section, for **Maximum File Size Megabytes**, enter: `20`.
8. Click **Save and Close**.
9. In the **Confirmation** dialog box, click **OK**.

Configure Requisitioning Business Function for Your BU

10. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
11. Click the **Configure Requisitioning Business Function** task.
12. In the **Specify Requisitioning BU** dialog box, select your `PRCXX Business Unit`, where XX is the number of your student user. Then click **OK**.
13. On the **Configure Requisitioning Business Function** page, in **Default Procurement BU**, verify your PRCXX Business Unit.
14. In the **Requisitioning** section, from the **Default Deliver-to Organization**, select your `PRCXX Inventory Organization`, where XX is the number of your student user.
15. Turn on one-time addresses in requisitions by selecting the **Allow one-time addresses** checkbox.
16. In the **Ship-to Location** field, enter: `PRCXX Location`, where `XX` is the number of your student user.
17. Click **Save and Close**.
18. In the **Confirmation** dialog box, click **OK**.

Common Options for Payables and Procurement

19. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
20. Click the **Manage Common Options for Payables and Procurement** task.

    Hint: You may need to set the **Show** field to **All Tasks** to see the task.
21. On the **Manage Common Options for Payables and Procurement** page, from the **Business Unit** list, select `PRCXX Business Unit`, where `XX` is the number of your student user.
22. In the **Default Distributions** section, set:

    Hint: Enter the value for Liability. Then copy, paste, and modify as indicated in the other fields.

Liability	`101.10.22100.000.000.000`
Prepayment	`101.10.13500.000.000.000`
Conversion Rate Variance Gain	`101.10.78630.120.000.000`
Conversion Rate Variance Loss	`101.10.78630.120.000.000`
Discount Taken	`101.10.77600.120.000.000`
Miscellaneous	`101.10.60540.120.000.000`
Freight	`101.10.62510.120.000.000`

23. In the **Currency Conversion** section, set:

    Hint: Enter the value for Liability. Then copy, paste, and modify as indicated in the other fields.

Realized Gain Distribution	`101.10.78610.120.000.000`
Realized Loss Distribution	`101.10.78610.120.000.000`

24. In the **Expense Actuals** section, from the **Accrue Expense Items** list, select **At receipt**.
25. Click **Save and Close**.

Receiving Parameters for Your Inventory Organization

26. On the **Setup: Procurement** page, click the **Receiving** functional area.
27. Click the **Manage Receiving Parameters** task.
28. In the **Select Organization** dialog box, select your inventory organization: `PRCXXO`, where XX is the number of your student user. Click **OK**.
29. On the **Manage Receiving Parameters** page, in the **General** section, set:

Receipt Days Exceed Action	`None`
Over-Receipt Action	`None`
Receipt Routing	`Direct Delivery`
Allow substitute receipts checkbox	Deselected

30. In the **Receipt Number** section, set:

Generation	`Automatic`
Type	`Numeric`
Next Number	`1`

31. In the **RMA** section, set:

Receipt Routing	`Direct delivery`
RMA Validate Lots	`Unrestricted`

32. Click **Save and Close**.

Practice Complete

You have performed Procurement-specific configuration tasks required to use your procurement business unit to enter transactions.

Practice 7-2: Adding Roles to a User

Overview

In this practice you will view your student user's security roles, and see how to add roles to a user account.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 4-2: Creating a Business Unit, and practice 4-3: Creating an Inventory Organization.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. From the **Navigator**, under **Tools**, select **Security Console**.
   The **Security Console** opens displaying the **Roles** page. The **Roles** tab is selected.
2. Click the **Users** tab.
3. On the **User Accounts** page, leave the **Search** list set to **All.** In the **Search** field, enter your student's sign on user name. For example, enter `prcXX.student`, where XX is the number of your student user. Then click the **Search** button.
4. In the **Search Results**, click the **User Login** user name link.
5. On the **User Account Details** page, verify that your student user belongs to **US1 Business Unit,** and note the roles assigned to your user.
6. Click **Edit**.
7. On the **Edit User Account** page, click **Add Role**.
8. On the **Add Role Membership** dialog box, in the **Search** field, enter: `Procurement Requester`. Click **Search**.
9. From the **Search Results**, select the role: Procurement Requester with the code ORA_POR_PROCUREMENT_REQUESTER_ABSTRACT.
10. Click **Add Role Membership**.
11. On the **Confirmation** dialog box, click **OK**.
12. Repeat the previous steps to add additional roles:
    - **Warehouse Manager** (ORA_INV_WAREHOUSE_MANAGER_JOB)
    - **Accounts Payable Specialist** (ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB)
    - **Accounts Payable Manager** (ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB)
    - **Accounts Payable Supervisor** (ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB)

13. When all the roles have been added in the **Add Role Membership** dialog box, click **Done**.
14. Click **Save and Close**.
15. Click **Done**.

Add the BU Information for the Roles Added to your User

16. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
17. On the **Setup** page, select the **Procurement** offering.
18. On the **Setup: Procurement** page, click the **Users and Security** functional area.
19. Click the **Manage Business Unit Data Access for Users** task.
    Hint: To see the task you may have to select **All Tasks** from the **Show** field.
20. On the **Manage Data Access for Users** page, in the **Search Results** section, click the **Create** icon.
21. In the **Create Data Access for Users** dialog box, set:

User Name	`PRCXX.STUDENT` (where XX is your student number)
Role	`Procurement Requester`
Security Context	`Business Unit`
Security Context Value	`PRCXX Business Unit` (where XX is your student number)

22. Repeat the previous steps to add additional data access. **Note:** Use the **Duplicate** icon to add a row for each role. Only the Role .
    Create rows:

User Name	`PRCXX.STUDENT` (where XX is your student number)
Role	`Warehouse Manager`
Security Context	`Inventory Organization`
Security Context Value	Your inventory organization. For example, PRCXXO.

User Name	`PRCXX.STUDENT` (where XX is your student number)
Role	`Accounts Payable Specialist`
Security Context	`Business Unit`
Security Context Value	`PRCXX Business Unit` (where XX is your student number)

User Name	`PRCXX.STUDENT` (where XX is your student number)
Role	`Accounts Payable Manager`
Security Context	`Business Unit`
Security Context Value	`PRCXX Business Unit` (where XX is your student

	number)

User Name	`PRCXX.STUDENT` (where XX is your student number)
Role	`Accounts Payable Supervisor`
Security Context	`Business Unit`
Security Context Value	`PRCXX Business Unit` (where XX is your student number)

23. Click **Save and Close**.

Review the User Data Access by Role

24. In the **Manage Data Access for Users** page, select **Users with Data Access**
25. In the **User Name** field, enter: `PRCXX.student` (where XX is your student number).
26. Click **Search**. Confirm that the roles and business unit access you added to your student user are listed in the **Search Results**.
27. From the **Security Context** list, select **Inventory Organization**.
28. Again, in the **User Name** field, enter: `PRCXX.student` (where XX is your student number).
29. Click **Search**.
30. Click **Search**. Confirm that the roles and inventory organization access you added to your student user are listed in the **Search Results**.
31. Click **Done**.

Practice Complete

You have added additional non-Procurement business unit roles to your user.

Practice 7-3: Configuring Transaction Accounting

Overview

This practice is optional. It is not needed for any of the subsequent practices included in this course, and will not impact any other practices included in this course.

You will use the Transaction Account Builder to map an expense account to your business unit, when one is not defaulted through the normal process.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 4-2: Creating a Business Unit.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Transaction Account Rules** functional area.
4. Click the **Manage Mapping Sets** task.
5. On the **Manage Mapping Sets** page, in the **Search Results** section, click **Expense Accrual Account – Business Unit**.
6. On the **Edit Mapping Set** page, in the **Chart of Accounts** section, select the **US Chart of Accounts** row. The **US Chart of Accounts: Mappings** section displays.
7. In the **US Chart of Accounts: Mappings** section, click the **Add Row** icon.
8. Set:

Input – Sold-to BU Name	Enter the name of the business unit you created in an earlier practice. For example, enter `PRCXX Business Unit`, where XX is the number of your student user.
Output – US Chart of Accounts	`101.10.24220.000.000.000`. (This will be the **Expense Accrual** account mapped to your business unit.)
Effective Start Date	`01/01/2000`

9. Click **Save and Close.**
10. Click **Done.**

Practice Complete

You have used the Transaction Account Builder to map an expense account to your business unit.

Activities for Lesson 8: Suppliers

Demonstration 8-1: Confirming Procurement Agent Status

Instructor Note: The instructor should demonstrate Practice 8-1: Confirming Procurement Agent Status. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 8-2: Creating a Supplier

Instructor Note: The instructor should demonstrate Practice 8-2: Creating a Supplier. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 8-3: Performing Additional Supplier Definition Tasks

Instructor Note: The instructor should demonstrate Practice 8-3: Performing Additional Supplier Definition Tasks. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 8-4: Supplier Registration Flows

Instructor Note: The instructor should demonstrate Practice 8-4: Supplier Registration Flows. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 8-5: Configuring Supplier Portal

Overview

This demonstration shows how to configure Supplier Portal.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Specify the roles the supplier can grant to supplier contacts

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Supplier Portal** functional area.
4. Click the **Manage Supplier User Roles** task.
5. On the **Manage Supplier User Roles** page, all the roles that can be provisioned are listed in the **Role** column. The **Description** column provides explanations of the capabilities of each role.

Set default roles for registration requests

6. For each role, use the **Default for Supplier Portal** and **Default for Sourcing** check box columns to identify which roles appear by default as grantable to supplier contacts when you are creating a supplier registration request from either Supplier Portal or from Sourcing. This streamlines the process for creating supplier accounts, so that when you are create a user account for a supplier contact, you can simply select which roles you grant the supplier contact from the set of roles that appear by default.

   For example, for registration requests coming from Sourcing, you probably want the supplier bidder role to always show up as grantable list, and you probably don't want the supplier accounts receivable specialist or the supplier customer service representative ever to show up.
7. After you have specified the roles to be provisioned and the default assignments, click **Save and Close** and then click **OK.**

Set other Supplier Portal attributes

8. When you return to **Supplier Portal** functional area of the **Setup: Procurement** page, click the **Specify Supplier News Content** task.
9. On the **Specify Supplier News Content** page, you can enter messages or broadcast alerts that you want to appear to all the supplier contacts who sign in to Supplier Portal.
10. Note that you can update the text of existing messages and define new messages.
11. Sign out of the application.

Demonstration Complete

You have successfully shown how to configure Supplier Portal.

Practice 8-1: Confirming Procurement Agent Status

Overview

In this practice, you will check to ensure your student user is set up as a procurement agent.

NOTE: Your student user must be defined as a procurement agent to successfully complete the activities in the remaining lessons of this course.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Practice 4-1: Creating a Location

Practice 4-2: Creating a Business Unit

User Login

prcXX.student (where XX is the number of the student user assigned to you)

Steps

Confirm Procurement Agent Status in US1 Business Unit

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Procurement Foundation** functional area.
4. Click the **Manage Procurement Agents** task. **Note:** Use the version of the task that does not have a **Select** link in the **Scope** column.
5. On the **Manage Procurement Agents** page, in the **Procurement BU** field, enter **`US1 Business Unit`** if it has not already been set by default.
6. Enter your student user's name in the **Agent** field. Use the format **Last name, First name.** For example, for the user name **prc50.student**, enter: **`Student, PRC50`**.
7. Click **Search**.
   - If the **Search Results** show no row for your student user, then you **are not** defined as a procurement agent for this business unit. Continue with step 8.
   - If the **Search Results** show a row for your student user, then you **are** defined as a procurement agent for this business unit. Continue with step 10.

Configure Your Student User as a Procurement Agent in US1 Business Unit

8. To set up your student user as procurement agent for **PRCXX Business Unit** and **US1 Business Unit**, complete the steps in Practice 5-1: Managing Procurement Agents.
9. After defining your student user as a procurement agent, navigate back to the **Manage Procurement Agents** page using steps 1 through 4 above, and then continue with the next step below.

Confirm Procurement Agent Status in PRCXX Business Unit

10. On the **Manage Procurement Agents** page, in the **Procurement BU** field, enter the business unit: PRCXX Business Unit, where XX is number of your student user. For example, `PRC50 Business Unit`.
11. Click **Search**.
    - If the **Search Results** show no row for your student user, then you are **not** defined as a procurement agent for this business unit. Complete the steps in Practice 5-1: Managing Procurement Agents.
    - If the **Search Results** show a row for your student user, then you **are** defined as a procurement agent for this business unit.
12. Click **Done**.

Practice Complete

You have successfully checked to ensure your student user is set up as a procurement agent for the US1 Business Unit, and the business unit you created in an earlier practice (PRCXX Business Unit).

Practice 8-2: Creating a Supplier

Overview

In this practice, you will create a simple supplier definition. You will define the high-level information for the new supplier. You will also define an address and specify a site definition.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To successfully complete this practice, you must have completed Practice 8-1: Creating a Procurement Agent.

User Login

prcXX.student (where XX is the number of the student user assigned to you)

Steps

Create Supplier Header

1. From the **Navigator**, under **Procurement**, click **Suppliers**.
2. In the **Suppliers** work area, click the **Tasks** panel tab.
3. In the Tasks panel drawer, click the **Create Supplier** link.
4. In the **Create Supplier** dialog-box, set:

Supplier	`PrcXX Corp` (replace XX with your student number).
Business Relationship	Spend Authorized Note: If you do not create the supplier as spend authorized, you will not be able to define any supplier sites later in the practice.
Tax Organization Type	Corporation
Tax Country	United States
Taxpayer ID	Repeat your two digit student number three times. For example, if you are prc50.student, enter `505050`

5. Click **Create**.
   a. If the **Supplier Match Results** page opens, there are other supplier profiles with names similar to the supplier you are creating. The potential matches appear in the **Potential Matches** table.

      Carefully check the entries and if you are certain the supplier you are creating will be unique, click **Ignore Match Results and Create Supplier**.
6. On the **Edit Supplier** page, on the **Profile** tab, for **Supplier Type**, select **Services**.

Create Supplier Address

7. Click the **Addresses** tab.
8. Click the **Create** Icon.
9. On the **Create Address** page, set:

Address Name	`Main`
Country	`United States`
Address Line 1	`1234 Main`
City	`Foster City`
State	`CA`
Postal Code	`94404`
Address Purpose Ordering	Selected
Address Purpose Remit to	Selected

10. Click **Save and Close**.
11. On the **Confirmation** dialog box, click **OK**.

Create Supplier Site

12. On the **Addresses** tab, under **Address Name**, click **Main**.
13. On the **Edit Address** page, **Additional Information** section, under **Address Details**, in the **Sites** tab, click the **Add** icon.
14. From the **Procurement BU** list, select **US1 Business Unit**, if it has not already been set by default.
15. Note that because you arrived on this page from the create address flow, the address name **Main** is also used as the **Site Name**.
16. Ensure that the **Purchasing** and **Pay** check boxes are selected.
17. Click **Save and Close**
18. On the **Confirmation** dialog box, click **OK**.
19. On the **Edit Supplier** page, on the **Sites** tab, in the **Site** column, click **Main**.
20. This takes you to the **Edit Site** page for the Main site you created.

    Site information is specific to a business unit. Therefore you would need to repeat this process for each business unit site you create. The **Procurement BU** read-only field indicates which business unit the site is in.
21. Now you will specify the invoicing, payments, and site assignment information. Select the **Primary Pay** check box.
22. Click the **Invoicing** tab.

23. On the **Invoicing** tab, set:

Invoice Currency	US Dollar
Payment Currency	US Dollar
Hold Unmatched Invoices	No
Payment Terms	Net 30
Always Take Discount	No
Exclude Freight From Discount	No
Exclude Tax From Discount	No
Create Interest Invoices	No

24. Click the **Payments** tab. (You may need to scroll up to see the tab.)
25. Select the row with the **Payment Method** of **Check** and click the **Default** icon.
    The Check Payment Method row should now have a check mark in the **Default** column.
26. Click the **Site Assignments** tab.
27. Click the **Add** icon to add your Client business units. These are your company's business units. Because you are in your business unit site, you will only add yourself. From the **Client BU** list, select **US1 Business Unit**.
28. Click **Save and Close.**
29. On the **Confirmation** dialog box, click **OK**. This takes you back to the **Edit Supplier** page. (Notice there is a warning icon next to your Procurement BU value. If you hover your mouse over the icon, a message warns that this site has no active contacts. You will define a contact for the site in the next practice.)
30. Click **Save** and then **Submit**.
31. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully begun defining a supplier.

Practice 8-3: Performing Additional Supplier Definition Tasks

Overview

In this practice, you will continue creating a supplier definition.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To successfully complete this practice, you must have completed Practice 8-1: Creating a Procurement Agent and Practice 8-2: Creating a Supplier.

User Login

prcXX.student (where XX is the number of the student user assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click **Suppliers**.
2. In the **Suppliers** work area, click the **Tasks** panel tab
3. In the Tasks panel drawer, click the **Manage Suppliers** link.
4. Search for the supplier definition you created in Practice 8-2: Creating a Supplier (**Hint:** the name will be PrcXX Corp).
5. In the **Search Results** section, access the supplier definition of your supplier by clicking the **Supplier Name** link.
6. On the **Supplier** page, click **Edit**.
7. On the **Edit Supplier** page, **Profile** tab, click the **Transaction Tax** subtab.

   Hint: This subtab is in the **Profile Details** section.
8. Set:

Allow Tax Applicability	Selected
Rounding Level	Header
Rounding Rule	Nearest
Set Invoice Value as Tax Inclusive	No

9. Click the **Sites** tab, located at the top of the page.
10. Hover the mouse over the yellow alert icon for the Purchasing site line. Note the warning message: This site has no active contacts – you will create one.
11. Click the **Contacts** tab.
12. Click the **Create** icon.
13. On the **Create Contact** page, set:

First Name	Randy

Last Name	`Sim`
Email	`randy.sim@prcXX.com` where XX is your student number.

14. In the **Contact Addresses** section, click the **Select and Add** icon.
15. In the **Select and Add** dialog box, select the row with the address **Main**. (There should be only one address in the list).
16. Click **OK**.
17. Select the **Create user account** check box. The **Roles** tab populates with the default roles that will be assigned to your new contact.
18. Click **Save and Close**, and then click **OK** to confirm your changes. You return to the **Edit Supplier** page.
19. On the **Edit Supplier** page, click **Save** and **Submit**.
20. On the **Confirmation** dialog box, click **OK**.
21. On the **Manage Suppliers** page, your Prcxx Corp supplier definition should still show in the **Search Results** section. Click the **Supplier** link for your supplier.
22. Click **Edit**.
23. Click the **Sites** tab. Notice that the alert icon for the Main site is gone. By associating the contact Randy Sim with the site address Main, you also automatically associated the contact with the site itself.
24. In the **Site** column, click **Main**.
25. Click the **Purchasing** tab.
26. In the **Consigned Inventory** section, select the **Pay on use** check box.
27. In the **Self Billing** section, from the **Invoice Summary Level** list, select **Receipt**.
28. Select the **Create debit memo from return** check box.
29. Click the **Receiving** tab (you may need to scroll up to see the tab).
30. From the **Receipt Routing** list, select **Direct delivery**.
31. Click the **Site Assignments** tab. Notice the application has already created an entry for this site based on the business unit that was used during the supplier registration.
32. To propagate your site definitions across multiple business units, click the **Autocreate Assignments** button.
33. Click **Save and Close**.
34. On the **Confirmation** dialog box, click **OK**.
35. On the **Edit Supplier** page, click **Save** and then **Submit**.
36. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully completed your supplier definition.

Practice 8-4: Supplier Registration Flows

Overview

In this practice, you will view and modify the different supplier registration flows.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the number of the student user assigned to you)

Show the default registration page

1. From the **Navigator**, under **Procurement**, click **Negotiations**.
2. In the **Negotiations** work area, expand the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click **Create Negotiation**.
4. In the **Create Negotiation** dialog box, from the **Procurement BU** list, select **US1 Business Unit**.
5. From the **Negotiation Style** list, select **Standard Negotiation**.
6. From the **Negotiation Currency** list, select **USD**, and then click **Create**.
7. When the negotiation document appears, go directly to the **Suppliers** page by clicking the **Suppliers** train stop.
8. From the **Actions** menu in the **Suppliers** region, select **Register and Add**.
9. On the **Register and Add Supplier** page, you can see that the existing registration page asks for all the supplier detailed information (Addresses, Business Classifications, Bank Accounts, and Products and Services Categories). Toggle between a **Business Relationship** value of **Prospective** and **Spend** Authorized to show that the **Register and Add Supplier** page does not change.
10. Click **Cancel** to exit the **Register and Add Supplier** page.

Modify the registration page

11. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
12. On the **Setup** page, select the **Procurement** product offering.
13. On the **Setup: Procurement** page, click the **Suppliers** functional area.
14. Click the **Configure Supplier Registration and Profile Change Request** task.
15. On the **Configure Supplier Registration and Profile Change Request** page, set:

Business Classifications	Prospective	Hidden
Business Classifications	Spend Authorized	Enabled
Bank Accounts	Prospective	Hidden

Bank Accounts	Spend Authorized	Enabled

16. In the **Default Business Relationship for Registration Sources** section, set **Sourcing Invitation** to **Prospective**. This sets the default business relationship to **Prospective** for any supplier registration requests originating from Sourcing.
17. Click **Save and Close** and **OK** to confirm.

Register a new supplier

18. From the **Navigator**, under **Procurement**, click **Suppliers**.
19. In the **Suppliers** work area, expand the **Tasks** panel tab.
20. In the **Tasks** panel drawer, click **Register Supplier**.
21. Because all registration requests originating from Sourcing now default to prospective suppliers, and because business classification and bank account information is hidden by default for all prospective supplier registrations, you should not see regions for **Business Classifications** or **Bank Accounts** on the **Register Supplier** page. They were suppressed by the new registration configuration for prospective suppliers.
22. From the **Business Relationship** list, select **Spend Authorized**. Notice that the **Business Classifications** and **Bank Accounts** sections now appear. **Tip:** you may need to scroll the page to see the added sections.
23. Select **Prospective** from the **Business Relationship** drop-down..
24. Complete the registration page information to request registration for a new supplier. In the Company field, enter a company name based on your student number, for example, **`PRC25 Company`**. Make a note of the supplier name that you use.
25. Enter values for:
    - **Request Reason**
    - **Tax Organization Type**
    - **Tax Country**
    - **Taxpayer ID**
26. In the **Contacts** section, click **Create** and enter values for:
    - **First Name**
    - **Last Name**
    - **E-Mail**
27. In the **User Account** section, select the **Create user account** check box.
28. In the **Roles** tab, select a role row.
29. Click **OK**.
30. In the **Addresses** section, click **Create** and enter some address information. You must enter values for the required fields **Address Name**, **Country**, and **Address Purpose**.
31. Click **OK**.
32. Click **Register** and then **OK.** Note that this accepts the request and submits it for approval. It does not approve the registration itself.

View the registration request

33. From the **Navigator**, under **Procurement**, find and click **Suppliers**.
34. In the **Suppliers** work area, expand the **Tasks** panel tab.
35. In the **Tasks** panel drawer, click the **Manage Supplier Registration Requests** link.
36. On the **Manage Supplier Registration Requests** page, select **Pending Approval** from the **Approval Status** list.
37. Optionally, select **Internal Request** from the **Source** list to narrow the search criteria.
38. Click **Search**. You should see the registration request you submitted. Note that its **Approval Status** is set to **Pending Approval**.
39. Click **Done.**

Practice Complete

You have successfully completed your supplier definition.

Activities for Lesson 9: Supplier Agreements

Demonstration 9-1: Blanket Purchase Agreement: Overview

Overview

In this demonstration, you will open an existing Blanket Purchase Agreement and provide an overview of the important fields for this type of agreement.

The demonstration uses a predefined Blanket Purchase Agreement created by the user Calvin Roth.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

calvin.roth

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. Sign into the application as user calvin.roth.
2. From the **Navigator**, under **Procurement**, click the **Purchase Agreements** work area link.
3. On the **Overview** page, click the **Tasks** tab, then click **Manage Agreements**.
4. On the **Manage Agreements** page, in the **Agreement** field, enter: `52239`.
5. Click **Search**.
6. In the **Search Results** section, locate and click agreement **52239** to open it.
7. On the **Main** tab, **General** section, discuss the required fields, key fields, and fields that have impact downstream.
8. In the **Terms** subtab, discuss the key fields, and fields that have impact downstream.
9. Click the **Notes and Attachments** subtab.

   Note that there are no notes or attachments for this contract.
10. In the **Lines** section of the **Main** tab, discuss the required fields, key fields, and fields that have impact downstream.
11. Click the **Controls** tab.
12. In the **Business Unit Access** section of the **Controls** tab, discuss the required fields, key fields, and fields that have impact downstream.
13. In the **Order Processing** section, discuss the key fields, and fields that have impact downstream.
14. In the **Notification Controls** section, discuss the key fields, and fields that have impact downstream.
15. Click **Done**.

Demonstration Complete

You have reviewed an existing Blanket Purchase Agreement and provided an overview of the important fields for this type of agreement.

Demonstration 9-2: Contract Purchase Agreement: Overview

Overview

In this demonstration, you will open an existing Contract Purchase Agreement and provide an overview of the important fields for this type of agreement.

This demonstration uses a predefined Contract Purchase Agreement created by the user Calvin Roth.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

calvin.roth

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. As user calvin.roth, from the **Navigator**, under **Procurement**, click the **Purchase Agreements** work area link.
2. On the **Overview** page, click the **Tasks** tab, and click **Manage Agreements**.
3. On the **Manage Agreements** page, **Agreement** field, enter: **52167**.
4. Click **Search**.
5. In the **Search Results** region, locate and click agreement **52167** to open it.
6. On the **Main** tab, **General** section, discuss the required fields, key fields, and fields that have impact downstream.
7. In the **Terms** subtab, discuss the key fields, and fields that have impact downstream.
8. Click the **Notes and Attachments** subtab.

   Note that there are no notes or attachments for this contract.
9. Click the **Controls** tab.
10. In the **Business Unit Access** section of the **Controls** tab, discuss the required fields, key fields, and fields that have impact downstream.
11. In the **Order Processing** section, discuss the key fields, and fields that have impact downstream.
12. In the **Notification Controls** section, discuss the key fields, and fields that have impact downstream.
13. Click **Done**.

Demonstration Complete

You have reviewed an existing Contract Purchase Agreement and provided an overview of the important fields for this type of agreement.

Practice 9-1: Creating a Blanket Purchase Agreement with Automation Controls

Overview

You will create a blanket purchase agreement for a new model of laptop computer to be ordered from a favored supplier. The agreement will be used to automatically generate purchase orders from requisitions placed for the laptop.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents.

User Login

prcXX.student, where XX is the number of your student user

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Purchase Agreements** work area link.
2. Use the **Overview** page to perform common tasks for your purchasing documents, contract deliverables, and supplier base.

   View the infolets to monitor and edit agreements with the status of draft, in process, or pending, as well as agreements requiring attention.
3. Click the **Tasks** tab, then click **Create Agreement**.
4. Use the **Create Agreement** dialog box to enter basic information about the agreement. Set:

Style	Blanket Purchase Agreement
Procurement BU	US1 Business Unit
Supplier	`Office Depot`

5. Click the **Create** button.
6. Use the **Edit Document** page to edit and submit the document. In the **General** section of the **Main** tab, set:

Start Date	Select today’s date.
End Date	Select a date one year from today.
Agreement Amount	`10,000.00`

7. Use the **Lines** section to manage order lines. Click the **Add Row** icon. Set:

Description	`AS-XX Atom Smasher 15 Laptop` (replacing `XX` with the number of your student user)
Category Name	`Laptops`
UOM	`Ea`
Price	`2355.00`

8. Click the **Controls** tab, and in the **Order Processing** section note that the following automation controls are selected:
   - **Automatically generate orders**
   - **Automatically submit for approval**
9. Click the **Submit** button.
10. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have created a blanket purchase agreement with automation controls and company standard contract terms.

Depending on system performance, soon you should be able to find your agreement and verify that it is now an approved document. For example, you can use the Manage Agreements task, and search for documents where the supplier is Office Depot. If your blanket purchase agreement has a Status of Pending Approval, repeat the search later. When it’s approved, your blanket purchase agreement Status will be Open.

Practice 9-2: Creating a Blanket Purchase Agreement and Transferring to Supplier

Overview

You will create a blanket purchase agreement with optimal options that will be completed by the supplier. You will transfer the agreement to the supplier for collaboration, so the supplier can perform actions such as adding lines extracted from the supplier's catalog.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete Practice 5-1: Managing Procurement Agents.

User Login

prcXX.student, where XX is the number of your student user

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. In **Navigator**, under **Procurement**, click **Purchase Agreements**.
2. On the **Overview** page, click the **Tasks** tab.
3. Click **Create Agreement**.
4. In the **Create Agreement** dialog box, set:

Style	Blanket Purchase Agreement
Procurement BU	US1 Business Unit
Supplier	`Lee Supplies`

5. Click the **Create** button.
6. On the **Edit Document** page, note that an **Agreement** number is assigned.
7. Set:

Start Date	Select today’s date.
End Date	Select a date one year from today.
Agreement Amount	`10,000.00`

8. On the **Edit Document** page, from the **Actions** drop-down list, select **Transfer to Supplier**. Use the **Actions** list at page level, not one specific to any of the sections on the page.
9. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have created a blanket purchase agreement and transferred the agreement to the supplier.

A representative of Lee Supplies can now perform actions on the agreement using the Supplier Portal.

Practice 9-3: Creating a Contract Purchase Agreement

Overview

You will create a contract purchase agreement for automated ordering from a favored supplier. This agreement will be used to automatically generate purchase orders from requisitions placed for this supplier.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents.

User Login

prcXX.student, where XX is the number of your student user

Steps

1. In **Navigator**, under **Procurement**, click **Purchase Agreements**.
2. Click the **Tasks** tab, then click **Create Agreement**.
3. In the **Create Agreement** dialog box, set:

Style	Contract Purchase Agreement
Procurement BU	US1 Business Unit
Supplier	`Advanced Corp`

4. In the **Create Agreement** dialog, in **Style** select: **Contract Purchase Agreement**.
5. In **Procurement BU** select: **US1 Business Unit**.
6. In **Supplier** enter: **Advance**.
7. Click the **Advanced Corp** list item.
8. Click the **Create** button.
9. On the **Edit Document** page set:

Start Date	Select today’s date.
End Date	Select a date one year from today.
Agreement Amount	`10,000.00`

10. Click **Submit**.
11. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully created a contract purchase agreement with the standard contract terms approved by your organization.

Practice 9-4: Creating and Uploading Lines to a Blanket Purchase Agreement

Overview

You will create a blanket purchase agreement and upload some lines from an XML file provided by one of your suppliers. The items on this agreement will require manual intervention by a buyer before a purchase order can be issued.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete Practice 5-1**:** Managing Procurement Agents.

For this practice, use the XML file provided by your instructor.

User Login

prcXX.student, where XX is the number of your student user

Steps

Begin to Create Agreement

1. From the **Navigator**, under **Procurement**, click **Purchase Agreements**.
2. On the **Overview** page, click the **Tasks** tab, and then click **Create Agreement**.
3. In the **Create Agreement** dialog box, set:

Style	Blanket Purchase Agreement
Procurement BU	US1 Business Unit
Supplier	`Office Depot`

4. Click the **Create** button.
5. On the **Edit Document** page, set:

Start Date	Select today’s date
End Date	Select a date on year from today.
Agreement Amount	`45,000.00`

6. Click the **Controls** tab.
7. In the **Order Processing** section, ensure the following check boxes are *not* selected:
   - Automatically generate orders
   - Automatically submit for approval
8. In the **Notification Controls** section, click **Add Row**.
9. Set:

Condition	`Expiration`
Start Date	Select a date nine months from today.
End Date	Select a date one year from today.

Edit Upload File

10. **Oracle University students:** Access the remote desktop directory **D:\labs\proc** and locate the sample file for this activity: **Practice_9.4_BPAUploadLines.xml**.

    All other students: Ask your instructor where to find **Practice_9.4_BPAUploadLines.xml**.
11. Open **Notepad** and open the file: **Practice_9.4_BPAUploadLines.xml**.

    Note: To find Notepad on the remote desktop, click the **Start** button and search for the application.
12. There are two items to be uploaded and each has a **<DESCRIPTION>** element that begins with XX.
    a. In Notepad, select **Edit** > **Replace**.
    b. Replace all of the `XX-` in the file with your student user number. For example, for the PRC11.Student user, replace all `XX-` with `11-`.
13. Save the file, close Notepad, and return to your blanket purchase agreement.

Upload Lines From an XML File

14. Return to the **Main** tab.
15. In the **Lines** region, from the **Actions** menu, select **Upload Lines**.
16. From the **File Type** list, select **Oracle XML**.
17. Click the **Choose File** button.
18. Use the **Open** Explorer dialog box to browse for and select the **Practice_9.4_BPAUploadLines.xml** file that you modified earlier.
19. Click **OK** if prompted.
20. Leave the **Apply mapping** check box deselected for this exercise.

    The check box is used to map supplier unit of measure and category to the corresponding internal unit of measure and category.
21. From the **Continue Editing After Successful Upload** list, select **No**.
22. Click the **Submit** button.
23. On the **Confirmation** dialog box, click **OK**.

Verify Agreement Submittal

24. To verify your success and the document's status:
    - Use the **Manage Agreements** task.
    - Search for agreements in which the **Supplier** is **Office Depot**.
    - In the **Search Results** locate and open the document you just created and submitted.

      Hint: Look for the **Agreement Amount** of **$45,000.00** and today's creation date.

25. Open the agreement and verify that it includes the two lines you just uploaded.
26. Depending on the settings in the course environment, if your agreement has a status of Incomplete, you will need to:
    - Select **Edit** from the **Actions** menu.
    - On the **Edit Document** page, click **Submit** to start the approval process for the agreement.
27. If your agreement has a status of **Open**, it has been approved.

Practice Complete

You have successfully created and uploaded lines to a blanket purchase agreement.

Activities for Lesson 10: Procurement Catalogs

Demonstration 10-1: Creating Value Sets

Overview

In this demonstration, you will create information template value sets for use in the flexfields for ordering business cards.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Self Service Procurement** functional area.
4. Click the **Manage Information Template Value Sets** task. **Hint:** From the **Show** list, select **All Tasks**.
5. In the **Search Results** section, select **Create**.
6. On the **Create Value Set** page, set:

Value Set Code	`XXJob Title` (for example, 00Job Title)
Description	`XXJob Title`
Module	Self Service Procurement Common Components
Validation Type	Format Only
Value Data Type	Character
Value Subtype (in Definition section)	Text
Maximum Length	`50`

7. In the **Definition** section set:

Value Subtype	Text

Maximum Length	`50`

8. Click **Save and Close**.
9. In the **Search Results** section, click **Create**.
10. Set:

Value Set Code	`XXE-mail Address` (for example, 00E-mail Address)
Description	`XXE-mail Address`
Module	Self Service Procurement Common Components
Validation Type	Format Only
Value Data Type	Character

11. In the **Definition** section, set:

Value Subtype	Text
Maximum Length	`50`

12. Click **Save and Close**.
13. Click **Save and Close** again.

Demonstration Complete

You have created information template value sets.

Demonstration 10-2: Creating Information Template Descriptive Flexfields

Overview

In this demonstration, you will create and deploy flexfields to be used when ordering business cards.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Create a Context

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Self Service Procurement** functional area.
4. Click the **Manage Information Template Descriptive Flexfields** task. **Hint:** From the **Show** list, select **All Tasks**.
5. Select the **Requisition Information Template** row and click **Edit**.
6. Click **Manage Contexts**.
7. In the **Search Results** section, select **Create**.
8. Set:

Display Name	`XXEmployee Business Cards`
Context Code	`XXBusiness Cards`
Description	`Employee business card information.`
API Name	`BusinessCards`

9. Click **Save and Close**.
10. On the **Manage Contexts** page, click **Save and Close**.

Create a Context Sensitive Segment for Employee Business Cards

11. On the **Manage Information Template Descriptive Flexfields** page, in the **Context Sensitive Segments** section, ensure that **XXEmployee Business** Cards is selected from the **Context** list.
12. In the **Context Sensitive Segments** section, click **Create**.
13. In the **Name** field, enter `XXJob Title`.
    The **Code** and **API Name** fields are automatically populated to match the **Name** field.
14. In the **Column Assignment** section, set:

Data Type	Character
Table Column	ATTRIBUTE1

15. In the **Validation** section, set:

Value Set	Search for and select: `XXJob Title`
Required	Selected

16. In the **Display Properties** section, set:

Prompt	Provide your job title for the business cards.
Display Type	Text Box

17. Click **Save and Close**.

Create a Context Sensitive Segment for E-mail Address

18. In the **Context Sensitive Segments** section, ensure that **XXEmployee Business Cards** is selected from the **Context** list.
19. In the **Context Sensitive Segments** section, select **Create**.
20. In the **Name** field, enter `XXE-Mail Address`.
    The **Code** and **API Name** fields are automatically populated to match the **Name** field.
21. In the **Column Assignment** section, set:

Data Type	Character
Table Column	ATTRIBUTE2

22. In the **Validation** section, set:

Value Set	Search for and select: `XXE-mail Address`
Required	Selected

23. In the **Display Properties** section, set:

Prompt	Provide your e-mail address for the business cards.
Display Type	Text Box

24. Click **Save and Close**.

25. Click **Save and Close** again.
26. The **Manage Information Template Descriptive Flexfields** page is displayed.

Deploy the flexfields

27. The flexfields you created must be deployed in order for them to be used. Click **Deploy Flexfield**.
28. When deployment of the two flexfields has completed successfully, click **OK** in the **Confirmation** dialog box.
29. Click **Done**.

Demonstration Complete

You have created and deployed flexfields.

Demonstration 10-3: Reviewing and Creating Categories

Overview

Review, create, and move a catalog category to see how the catalog hierarchy works. Then you will add a browsing category to an existing browsing category.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, click the **Self Service Procurement** functional area.
4. Click the **Manage Catalog Category Hierarchy** task. **Hint:** From the **Show** list, select **All Tasks**.

Review Existing Category Hierarchy

5. Expand the **Office Technology** browsing category.
6. Expand the **Accessories** browsing category to expose additional browsing categories.
7. Expand the **Computer Peripherals** category to expose the **Peripherals** item category.

Create and Move a Category

8. Click the **Office Furniture** category row.
9. Click **Create**.
10. In the **Category Name** field, enter: `XXFurniture Accessories.`
11. In the **Description** field, enter: `XXOffice Furniture Accessories.`
12. Click **Save and Close**.

13. Expand the **Office Furniture** browsing category to verify that **XXFurniture Accessories** was added.
14. Select the **XXFurniture Accessories** row.
15. Click **Create**.
16. In the **Create Browsing Category** dialog box, in the **Category Name** field, enter: `XXLamps`.
17. In the **Description** field, enter: `XXDesk Lamps`.
18. Click **Save and Close**.
19. Expand **XXFurniture Accessories** to verify that **XXLamps** was added.
20. Select the **XXFurniture Accessories** row selected.
21. From the **Actions** menu, select **Move**.
22. In the **Move Category** dialog box, enter `Root Category` in the **Parent Category** field.
23. Click **Save and Close**.

    Note that **XXFurniture Accessories** is now at the Root Category level.

Create a Browsing Category to Be Used to Create an Informational Catalog

24. Click the **Services** category row.
25. Click **Create**.
26. In the **Create Browsing Category** dialog box, in the **Category Name** field, enter: `XXEducation Services`.
27. In the **Description** field, enter: `XXOracle Education Services`.

    If you want to associate an image for the category, enter a URL in the **Image URL** field.
28. Press **Tab** to preview the image.
29. Click **Save and Close**.
30. Click **Done** to close the **Manage Catalog Category Hierarchy** page.

Demonstration Complete

You have created a browsing category.

Demonstration 10-4: Creating a Category Map

Overview

In this demonstration, you will create a category map that can be associated with a punchout from **XXOffice Supplies**, or used while uploading agreement lines from **XXOffice Supplies**. This map will be used to map categories from **XXOffice Supplies** to corresponding categories defined within Oracle Self Service Procurement Cloud. You will first create a map set for **XXOffice Supplies** before creating the category map.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

You must have ADFdi installed on your local machine to complete the following demonstration.

Make sure you have the Com Add-ins for ADFdi enabled. Start **Excel** and from the **File** menu, select **Add-Ins**. Under **Add-Ins**, you should see **ADF Desktop Integration** and under that, **Oracle ADF 11g Desktop Integration**.

If you have trouble getting the spreadsheet to work, follow these steps (for Microsoft Office 2013):

- Open the Microsoft Office 2013 system application in question.
- From the **File** menu, select **Options.**
- Click the **Trust Center** tab, and then click **Trust Center Settings**.
- Click the **Macro Settings** tab, and select the **Trust access to the VBA project object model** check box.
- Click **OK**.
- Click **OK** again.

For other versions of Office, you can find information about the fix here: https://support.microsoft.com/en-us/kb/282830

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Supplier Content Map Sets** link.

4. In the **Search Results** section, click **Create**.
5. In the **Create Map Set** dialog box, set:

Procurement BU	US1 Business Unit
Map Set	`XXOffice Supplies`
Description	`XXMap Set for Office Supplies`

6. Click **Save and Close**.
7. In the **Confirmation** dialog box, click **OK**.
8. In the newly created **XXOffice Supplies** row, click the **Manage Maps** icon in the **Manage Maps** column.
9. On the **Manage Maps** dialog box, click the **Create** icon in the **Create** column in the **Category** row.
10. If it displays, on the **Opening EditCategoryMap.xlsx** dialog box, select the **Microsoft Excel (default)** from the **Open with** drop-down.
11. Click **OK**. Excel launches.
12. If Excel started in ‘PROTECTED VIEW’, click **Enable Editing**.
13. If the **Connect** dialog box is displayed, click **Yes**.
14. You may be asked to sign in again. Sign in as **prc00.instructor/<course password>**.

    The Excel spreadsheet loads.
15. You will now enter the **External Category** and **Internal Category** names for the map set in Excel.
    The **External Category** column contains values from the punchout response or agreement upload file from **XXOffice Supplies**.
    The **Internal Category** column contains corresponding values used in the Self Service Procurement application.
    Set:

Notepads	Office Supplies
Fountain Pens	Office Supplies
Regular Pens	Office Supplies

Hint: On the **Home** tab, under **Insert**, use **Insert Sheet Rows** to add more rows.

16. On the **Manage Map** tab, click **Upload**.
17. Select the **On failure**, **continue to upload subsequent rows** check box in the **Upload Options** dialog box.
18. Click **OK**.

    Note the **Status** column value is **Row inserted successfully** for each row successfully processed.
19. Close the spreadsheet without saving changes.
20. Click **OK** in the **Manage Maps** dialog box.

21. In the **XXOffice Supplies** row, click the **Manage Maps** icon in the **Manage Maps** column.
22. Notice that in the **Category** row, the **Create** icon is no longer available. There are still icons for **Edit** and **Delete**.
23. Click **OK**.
24. Click **Done** to close the **Manage Supplier Content Maps Sets** page.

Demonstration Complete

You have created a category map.

Demonstration 10-5: Creating a Local Catalog

Overview

In this demonstration, you will create a local catalog which will include all master items for the supplier Allied Manufacturing.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Catalogs** link.
4. Click **Create Local Catalog**.
5. In the **Create Local Catalog** dialog box, set:

Procurement BU	US1 Business Unit
Catalog	`XXLocal Catalog`
Description	`XXLocal Catalog for US Employees`

6. From the **Procuremen**t BU list, select **US1 Business Unit**.
7. In the **Catalog** field, enter: `XXLocal Catalog`.
8. In the **Description** field, enter: `XXLocal Catalog for US Employees`.
9. In the **Agreements** section, select **Include items from specific agreements**.
10. Click **Select and Add**.
11. In the **Select and Add: Agreements** dialog box, in the **Supplier** field, enter: `Allied%`.
12. Click **Search**.
13. Select the **Allied Manufacturing** row.
14. Click **Done**.
15. Select the **Include all master items** check box.
16. In the **Categories** section, select **Include items from all categories**.

17. Click **Save and Close**.
18. On the **Confirmation** dialog box, click **OK**.

Demonstration Complete

You have created a local catalog.

Demonstration 10-6: Creating an Informational Catalog

Overview

In this demonstration, you will create an informational catalog, which will be used for Oracle Education Services.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses catalog category and browsing category objects created in Demonstration 10-3: Reviewing and Creating Categories.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Catalogs** link.
4. Click the **Create Local Catalog** drop-down button and select **Create Informational Catalog.**
5. On the **Create Informational Catalog** page, select **US1 Business Unit** from the **Procurement BU** drop-down.
6. Set:

Catalog	`XXOracle Education Services`
Catalog Description	`XXEducation Services`
URL	`http://education.oracle.com`
Keywords	`education class course`
Image URL	(If you wish to enter an image, enter the URL for the image and press Tab to preview the image)

Note: Keywords are separated with a space. When Self Service Procurement users perform a shopping search, informational catalogs containing keywords that match the search string will be returned in the search results.

7. Next, you will associate the informational catalog with the browsing category XXEducation Services. In the **Category Assignments for Catalog Browsing** section, click the **Select and Add** icon.
8. In the **Select and Add: Categories** dialog box, in the **Category Name** field, enter `XXEducation`.
9. Click **Search**.
10. Select the **XXEducation Services** browsing category row.
11. Click **Done**.
12. Click **Save and Close**.
13. On the **Confirmation** dialog box, click **OK**.
14. Click **Done** to close the **Manage Catalogs** page.

Demonstration Complete

You have created an information catalog.

Demonstration 10-7: Creating an Information Template

Overview

In this demonstration, you will create an information template to be used for ordering business cards.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses objects created in previous demonstrations in this lesson including flexfields created in Demonstration 10-2: Create Information Template Descriptive Flexfields.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Information Templates** link.
4. On the **Manage Information Templates** page, click the **Create** icon in the **Search Results** section.
5. On the **Create Information Template** page, set:

Procurement BU	US1 Business Unit
Information Template	`XXBusiness Cards Information`
Display Name	`XXAdditional Employee Information`
Instruction Text	`Provide information to be printed on your business cards.`

6. From the **Attribute List**, select **XXEmployee Business Cards**.
   The Attribute List contains information template context segments that were set up in Demonstration 10-2: Creating Information Template Descriptive Flexfields.
7. In the **Category Associations** section, click the **Select and Add** icon.
8. Search for and select **Miscellaneous**.
9. Click **Done**.

10. Click **Save and Close**.
11. In the **Confirmation** dialog box, click **OK**.
12. Click **Done**.

Demonstration Complete

You have created an information template.

Demonstration 10-8: Creating a Smart Form

Overview

In this demonstration, you will create a smart form for business cards requests. You will also assign the smart form to an information template and a catalog browsing category.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses objects created in previous demonstrations in this lesson (10-x).

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Smart Forms** link.
4. On the **Manage Smart Forms** page, the **Search Results** section, click the **Create** icon in.
5. On the **Create Smart Form** page, set:

Procurement BU	`US1 Business Unit`
Smart Form	`XXBusiness Cards`
Instruction Text	`Verify all information before adding this item to the requisition.`
Keywords	`business cards name`
Image URL	(If you wish to enter an image, enter the URL for the image and press Tab to preview the image)

6. In the **Default Item Information** section, set:

Item Description	`XXBusiness Cards`
Category Name	Miscellaneous
Quantity	`1`
UOM	Ea

Price	20.95

7. In the **Information Template Assignments** section, click the **Select and Add** icon.
8. Click the **XXBusiness Cards Information** row.
9. Click **Done**.
10. In the **Category Assignments for Catalog Browsing** section, click the **Select and Add** icon.
11. Select the **Office Supplies** browsing category row
12. Click **Done**.
13. Click **Save and Close**.
14. In the **Confirmation** dialog box, click **OK**.
15. Click **Done** to close the **Manage Smart Forms** page.

Demonstration Complete

You have created a smart form.

Demonstration 10-9: Creating a Content Zone

Overview

You already defined the catalog content, which includes local catalog, informational catalog, and smart forms. In this demonstration, you will make the catalog content available to all workers who will create requisitions in the business unit **US1 Business Unit**.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses objects created in previous demonstrations in this lesson (10-x) including catalogs and smart forms.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Content Zones** link.
4. In the **Search Results** section, click the **Create** icon.
5. On the **Create Content Zones** page, set:

Procurement BU	US1 Business Unit
Content Zone	`XXCatalog Content`
Description	`XXContent`
Usage	Requisitioning

6. Now you will add the XXEducation Services and XXLocal Catalog categories to the content zone.
   In the **Catalogs** section, click the **Select and Add** icon.
7. Search for and select the **XXOracle Education Services** row.
8. Click **Apply**.
9. Select the **XXLocal Catalog** row.
10. Click **Done**.

11. Now you will add the **XXBusiness Cards** smart form to the content zone.
    In the **Smart Forms** section, click the **Select and Add** icon.
12. Search for and select the **XXBusiness Cards** row.
13. Click **Done**.
14. Now you will secure the content zone to US1 Business Unit.
    In the **Security** section, select **Secured by Requisitioning BU**.
15. In the **Security** section, click the **Select and Add** icon.
16. Select the **US1 Business Unit** row.
17. Click **Done**.
18. Click **Save and Close**.
19. On the **Confirmation** dialog box, click **OK**.
20. Click **Done** to close the **Manage Content Zones** page.

Demonstration Complete

You have made catalog content available to workers in the US1 Business Unit.

Demonstration 10-10: Reviewing Procurement Content

Overview

In this demonstration, you will give an overview of procurement content. You will create a requisition for a new employee using the different catalog types and a smart form.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Refers to objects created in previous demonstrations in this lesson (10-x).

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Set Requisition Preferences

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. On the **Requisitions** page, click the **More Tasks** menu and select **Update Requisition Preferences**.
3. On the **Edit Requisition Preferences** page, note the **Requisitioning BU** is set to **US1 Business Unit**.
4. In the **Shipping and Delivery** section, in **Deliver-to Location** enter `Seattle`.
5. In the **Favorite Charge Accounts** section, click **Add**.
6. In the **Nickname** field, enter `PRC00 Instructor Charge Account`.
7. In the **Charge Account** field, enter `101.10.12102.000.131.000.`
8. Click **Save and Close**.

Search for Items

9. Search for a printer by entering `printer` in the **search** field.
10. Click **Search**.
11. Click the **Phaser3610** item's **Add to Cart** icon.

    Notice that the item count displayed next to the page-level **Shopping Cart** icon increments and a pop-up message is briefly displayed indicating that the item is added to the cart.
12. Click **Done**.

View Informational Catalog

13. In the **Search** field, enter `education`.
14. Click **Search**.
15. Click **XXEducation Services** to launch the informational catalog.
    Close the active browser window for the Education Services informational catalog.
16. Click **Done**.
17. Note that the informational catalog is also displayed in the **Information and Tips** section of the **Requisitions** page.

Browse Catalog Categories

18. Click **Shop by Category**.
19. Expand the **Office Supplies** browsing category.
20. Click the **Desk Supplies** browsing category.
21. Click the **Add to Cart** icon for one of the items

    Notice that the item count displayed next to the page-level **Shopping Cart** icon has incremented.
22. Click **Done**.

Order Using a Smart Form

23. On the **Requisitions** page, in the **Request Forms** section, click **XXBusiness Cards**.
24. In the **Additional Information** section, in the **Job Title** field, enter: `Director of Operations`.
25. In the **E-mail** field, enter: `calvin.roth@Vision.com`.
26. Click **Add to Cart**.
27. Click **Done**.

Submit the Requisition for Approval

28. Click the **Shopping Cart** icon. The Shopping Cart details are displayed.
29. Click **Review**.
30. Change the **Description** field to: `Office supplies`.
31. In the **Justification** field, enter: `Supplies for new employee.`
    Notice any icons in the **Additional Information Required** column of the **Requisition Lines** section. You can click this icon to change the Job Title and e-mail address information you provided for the business cards.
32. Click **Submit**.
33. On the **Confirmation** dialog box, click **OK**.

Demonstration Complete

You have given an overview of procurement content.

Practice 10-1: Viewing and Creating a Browsing Category Hierarchy

Overview

First, you will create a Browsing Category in the Browsing Hierarchy. The Browsing Hierarchy defines how approved content is presented to users for Browsing. The majority of the hierarchy is defined for the testing environment. You will add a category to the existing structure.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Catalog Category Hierarchy** link.
4. Expand the **Office Technology** category.
5. Expand the **Accessories** category folder under **Office Technology**.
6. Expand the **Computer Peripherals** category folder under **Accessories**.

   At this point you should have a feel for navigating the category structure.
7. Next you will add a new browsing category. Click **Root Category**.
8. From the **Action** menu, select **Create**.
9. In the **Create Browsing Category** dialog box, in the **Category Name** field, enter: `XXMemory Products`.
10. In the **Category Description** field, enter: `All authorized memory products`.
11. Add an image URL in the **Image URL** field if you want. Any valid image URL can be used. This image will be presented on the **Requisitions** page if content is associated with it.
12. Click **Save and Close**.

    You should now be able to see your new category in the list.
13. From the **View** menu, select **Expand All** to view the details of your entire hierarchy.
14. Click **Detach** to open a separate page with a better view of the hierarchy.

    A File icon indicates that a row is a browsing category. A Page icon indicates that a row is an item or purchasing category.

    The **XXMemory Products** category you just added can now be used to set up browsing within Self Service Procurement and will be used later in this activity.

15. Click **Close** to close the detached page.
16. Click **Done**.

Practice Complete

You have created a browsing hierarchy entry.

Practice 10-2: Creating Information Templates

Overview

Information templates allow the collection of additional information needed for the purchase of goods or services. Information templates leverage Descriptive Flexfields to build customized information collection.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

In order to successfully complete this practice, your user must be configured as a procurement agent for the US1 Business Unit in Practice 5-1: Managing Procurement Agents.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

Create Value Sets

1. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement page**, click the **Self Service Procurement** functional area.
4. Click the **Manage Information Template Value Sets** task. **Hint:** From the **Show** list, select **All Tasks**.
5. In the **Search Results** section, click **Create** to add a new value set.

   Certain codes and names that follow in this section of the script require unique descriptors for this training session. These codes and names will be annotated with "plus your initials" following the name. All codes and names with this annotation should include your initials at the end of the name. For example, if you are naming a flexfield segment Laptop Manufacturer and you are John Doe, then the segment name would be Laptop Manufacturer JD.
6. On the **Create Value Set** page, set:

Value Set Code	`Laptop Manufacturer XX`
Description	`XXContent`
Module	`Self Service Procurement Common Components`
Validation Type	Independent
Value Data Type	Character

Value Subtype	Text
Maximum Length	`50`

The rest of the fields are optional and will not be used in the script.

7. Click **Save and Close**.
8. On the **Manage Information Template Value Sets** page, in the **Module** drop-down, select **Self Service procurement Common Components**.
9. Click **Search**.

   Your value set is included in the **Search Results** section.
10. Select the row for your value set and click **Manage Values**.
11. You will now add values that will populate a list of values in your information template when it is used. On the **Manage Values** page, click **Create**.
12. In the **Value** column enter: `Lenovo`.
13. Ensure that the check box in the **Enabled** column is selected. You can add information in the other fields if you like, but they are optional.
14. Click **Save and Close**.
15. Repeat steps 10 through 14 to create **Value Set Code** entries for `Toshiba`, `Dell`, and `Macbook`.
16. Click **Save and Close**.

Create a Context

17. On the **Setup: Procurement** page, click **Manage Information Template Descriptive Flexfields**.
18. Select the **Requisition Information Template** row.
19. Click **Edit**.

    Notice there are three sections in the **Manage Information Template Descriptive Flexfields** page:

    - **Global Segments:** (Do not create any entries under this section as they will show up on all information templates. These records cannot undone or deleted due to open code bugs/issues).
    - **Context Segment:** This section can be ignored.
    - **Context Sensitive Segments:** This is where you will create your own specific information template segment, as well as lines specific to each context segment or information template.
20. Click **Manage Contexts**.
21. On the **Manage Contexts** page, in the **Search Results** section, select **Create**.
22. Set:

Display Name	`Laptop Details XX`
Context Code	`Laptop Details XX`
Description	`Laptop Details`

Enabled check box	Selected

23. Click **Save**.

    The **Context Sensitive Segments** section should now be enabled for you to add entries.

Create Context Sensitive Segments

24. In the **Context Sensitive Segments** section, click **Create**.
25. Set:

Name	`Date of Purchase`
Code	`Date of Purchase`
Description	`Date of Purchase`
Data Type	Date
Table Column	ATTRIBUTE_DATE1
Value Set	GSE_Date_Format
Prompt	`Date of Purchase`
Display Type	Date/Time
Display Size	`25`
Display Height	Enter values as needed. If this is text field, there is no need to populate it.

26. Click **Save and Close**.
27. On the **Edit Context** page, in the **Context Sensitive Segments** section, click **Create**.
28. Set:

Name	`Laptop Manufacturer`
Code	`Laptop Manufacturer`
Description	`Laptop Manufacturer`
Data Type	Character
Table Column	ATTRIBUTE1
Value Set	`Laptop Manufacturer (plus your initials)`
Prompt	`Laptop Manufacturer`
Display Type	List of Values
Display Size	`25`
Display Height	Enter values as needed. If this is text field, there is no need to populate it.

29. On the **Create Segment** page, click **Save and Close**.

    Notice that the segments you created are visible in the **Context Sensitive Segments** section.

30. On the **Edit Context** page, click **Save and Close**.

    This returns you to the **Manage Contexts** page. Your newly created context should now be visible (for example, Laptop details).

31. Click **Save and Close**.

32. This should return you to the **Manage Information Template Descriptive Flexfields** page.

    Notice that in the **Context Sensitive Segments** section, the **Context** drop-down includes all the available contexts.

    Be sure to choose your specific context from the drop-down list to verify that the lines, sequence and so on are correct.

33. Click **Save and Close**.

Deploy Descriptive Flexfield

34. The flexfields you created must be deployed in order for them to be used. Click **Deploy Flexfield.**

35. When deployment of the two flexfields has completed successfully, click **OK** in the **Confirmation** dialog box.

    Notice the **Deployment Status** column now has the value **Deployed** (green check mark).

36. Click **Done**.

    At this point the context records that will be used in the creation of an information template have been created.

Create Management Information Template

37. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.

38. On the **Catalogs** page, click the **Tasks** panel tab.

39. In the **Tasks** panel drawer, click the **Manage Information Templates** link.

40. On the **Manage Information Templates** page, in the **Search Results** section, click the **Create** icon.

41. On the **Create Information Template** page, set:

Procurement BU	US1 Business Unit
Information Template	`Laptop Details (plus your initials)`
Display Name	`Laptop Details (plus your initials)`
Instruction Text	`Provide laptop details.`

42. In the **Attribute List** drop-down, select the context value you created earlier (`Laptop Details` plus your initials).

43. From the **Attachment Category** list, select **To Supplier**.

    At this point, you could associate the template to specific categories or items.

    In this case, however, you will be using the information template in a smart form. The association will be configured in the **Smart Form** page.

    There is no need to associate to a category or item.

44. Click **Save and Close**.
45. On the **Confirmation** dialog box, click **OK**.
46. Click **Done**.

Practice Complete

You have created an information template, value sets, context sensitive segments, and deployed descriptive flex fields.

Practice 10-3: Creating a Smart Form

Overview

In this practice, you will create a smart form.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses the Laptop Details information template created in Practice 10-2: Creating Information Templates.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Smart Forms** link.

   On the **Manage Smart Forms** page, in the **Search Results** section, click the **Create** icon. You will be creating a Memory Products smart form similar to the office supplies smart form you used in the requisition creation scenario. The objective is to create a customized noncatalog request for memory purchases such that basic category and supplier information is correct and the requisition created is delivered to the correct buyer.
4. On the **Create Smart Form** page, set:

Procurement BU	US1 Business Unit
Smart Form	`Memory Products Non Catalog Request (plus your initials)`
Instruction Text	`This form is for ordering any memory products you could not find in the catalog.`
Keywords	`laptop desktop memory`
Image URL	(If you wish to enter an image, enter the URL for the image and press Tab to preview the image)

5. In the **Default Item Information** section, set:

Line Type	Goods
Item Description	Leave empty. Select **User editable**.

Category Name	Select **Laptops** Deselect **User editable**.
Quantity	No changes.
UOM	No changes.
Price	No changes.
Currency	Select **USD**. Deselect **User editable**.
Negotiation Required	Deselect.
Negotiated	Deselect.
Agreement	Leave empty. Deselect **User editable**.
Supplier	Lee Supplies (or your supplier). Deselect **User editable**.
Supplier Site	Leave empty. Deselect **User editable**.
Contact	Leave empty.
Phone	Leave empty. Deselect **User editable**.
Supplier Item	No changes.

6. In the **Information Template Assignments** section, click the **Select and Add** icon. You will now add the information template you created previously.
7. In the **Search** field, enter `Laptop Details` and click **Search**.
8. Select the **Laptop Details** row and click **Done**. You will now assign a category to the smart form.
9. In the **Category Assignments for Catalog Browsing** section, click the **Select and Add** icon.
10. Search for the **Memory Products** category you just created.
11. Select the **Memory Products** row and click **Done**.

    The **Attachments** section is used to add attachments if desired.
12. Click **Save and Close**.
13. Click **OK**.
14. Click **Done**.

Practice Complete

You have created a content smart form.

Practice 10-4: Creating Catalogs

Overview

In this practice, you will create a local catalog, an informational catalog, and a punchout catalog.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses the Memory Products smart form you created in Practice 10-3: Creating a Smart Form.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

Create a Local Catalog

A local catalog is a collection of local content to present to users in Self Service Procurement. The content can be sourced from agreements or master items. You will set up a catalog to include all categories in a specified agreement. A catalog can be set up to include multiple agreements, to include all agreements or to exclude specific agreements. It can also be configured to include or exclude specific categories within the selected agreements.

1. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
2. On the **Catalogs** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Manage Catalogs** link.
4. Click **Create Local Catalog**.
5. From the **Procurement BU** drop-down, select **US1 Business Unit**.
6. In the **Catalog** field, enter **`PT Training Catalog`** `plus your initials`. For example, if you are John Doe then name the catalog name PT Training Catalog JD.
7. In the **Agreements** section, select **Include items from specific agreements**.
8. Click **Select and Add**.
9. In the **Select and Add: Agreements** dialog box, in the **Agreement** field, enter `52178`.
10. Click **Search**.
11. Select **Agreement 52178** and click **OK**.

    Do not enable master items by selecting the **Include all Master Items** check box in the **Agreements** section.
12. Click **Save and Close**.

13. On the **Confirmation** dialog box, click **OK**. You are returned to the **Manage Catalogs** page. The local catalog is complete.

Create an Informational Catalog

14. Click the **Create Local Catalog** drop-down button and select **Create Informational Catalog**.

    Informational catalogs provide information within the shopping flow. They are often used to provide detailed purchasing policy information, quick reference content, computer upgrade policies, visa policies, services policies, support policies and so on. Information Catalogs are essentially configurable, searchable, browse-able links to information on an HTML page.

15. On the **Create Informational Catalog** page, select **US1 Business Unit** from the **Procurement BU** drop-down.
16. Enter the following values:

Catalog	`Memory Policies` plus your initials. For example, if you are John Doe then name the catalog name Memory Policies JD.
Catalog Description	`Please read for instructions on ordering memory upgrades for your laptop.`
URL	`http://education.oracle.com`
Keywords	`upgrade laptop desktop memory` (Note: keywords are separated by a space.)
Image URL	(If you wish to enter an image, enter the URL for the image and press Tab to preview the image)

Assign categories for browsing

17. In the **Category Assignments for Catalog Browsing** section, click the **Select and Add** icon.
18. In the **Select and Add: Categories** dialog box, enter `XXMemory Products` in the **Category Name** field.
19. Click **Search**.
20. Select the **XXMemory Products** browsing category row.
21. Click **Done**.
22. Click **Save and Close**.
23. On the **Confirmation** dialog box, click **OK**. You are returned to the **Manage Catalogs** page.

Create a Punchout Catalog

24. Click the **Create Local Catalog** drop-down button and select **Create Punchout Catalog**.

A punchout Catalog is a device to navigate requesters to a third-party website to buy goods and services. All items are under contract and will be pulled back into the ERP system for processing. This allows the enterprise to reduce catalog management by using the supplier website and catalog.

25. On the **Create Punchout Catalog** page, select **US1 Business Unit** from the **Procurement BU** drop-down.
26. In the **Catalog** field, enter `Dell` plus your initials. For example, if your name is John Doe, enter Dell JD.
27. Set:

Catalog	Enter `Dell` plus your initials. For example, if your name is John Doe, enter Dell JD.
Description	`Please read for instructions on ordering memory upgrades for your laptop.`
Keywords	`upgrade memory laptop desktop`
Image URL	`http://i.dell.com/images/global/brand/ui/nxgen/logo73.png`
Source	Direct xCML supplier Punchout
Supplier	`Dell Inc.`
Supplier Name	`Dell Inc.`
Supplier ID	`144709199`
Punchout URL	`https://b2bpreview.dell.com/invoke/B2BDirect.Entry/processDocument`
Password	`Car5tair5`
Domain	`DUNS`
Identity	`144709199`

Assign a category for browsing

28. In the **Category Assignments For Catalog Browsing** section, click the **Select and Add** icon.
29. Search for your recently created category, **XXMemory Products**.
30. Select the **XXMemory Products** browsing category.

31. Click **Done**.
32. Click **Save and Close**.
33. On the **Confirmation** dialog box, click **OK**. You are returned to the **Manage Catalogs** page.

Practice Complete

You have created a local catalog, an informational catalog, and a punchout catalog.

Practice 10-5: Creating a Content Zone

Overview

A content zone is used to securely distribute the catalog content you have created in the previous steps for access in the shopping flow. It can be secured and delivered by Business Unit or Individual.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses catalogs, smart forms, and other objects created in:

- Practice 10-1: Viewing and Creating a Browsing Category Hierarchy
- Practice 10-2: Creating Information Templates
- Practice 10-3: Creating a Smart Form
- Practice 10-4: Creating Catalogs

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

Update Requisition Preferences

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. On the **Requisitions** page, click the **More Tasks** menu and select **Update Requisition Preferences**.
3. On the **Edit Requisition Preferences** page, from the **Requisitioning BU** drop-down select **US1 Business Unit**.
4. In the **Shipping and Delivery** section, in the **Deliver-to Location**, field enter: `Seattle`.
5. In the **Favorite Charge Accounts** section, click **Add**.
6. In the **Nickname** field, enter `PRCXX My Charge Account`.
7. In the **Charge Account** field, enter `101.10.12102.000.131.000.`
8. Click **Save and Close**.

Create a Content Zone

9. From the **Navigator**, under **Procurement**, click the **Catalogs** work area link.
10. On the **Catalogs** page, click the **Tasks** panel tab.
11. In the **Tasks** panel drawer, click the **Manage Content Zones** link.
12. On the **Manage Content Zones** page, in the **Search Results** section, click the **Create** icon.
13. On the **Create Content Zone** page, set:

Procurement BU	US1 Business Unit
Content Zone	`XXCatalog Content`
Usage	Select Requisitioning.

Now you will add catalogs that you have created to the content zone.

Add Catalogs

14. In the **Catalogs** section, click the **Select and Add** icon.
15. In the **Select and Add: Catalogs** dialog box, search for and select the **PT Training Catalog** identified with your initials, for example, PT Training Catalog JD.
16. Click **Apply**.
17. Search for and select the **Memory Policies** informational catalog identified with your initials.
18. Click **Done**.

Add a Smart Form

Next, add the smart form you created.

19. In the **Smart Form** section, click **Select and Add**.
20. In the **Select and Add: Smart Forms** dialog box, search for and select **Memory Products Non Catalog Request** identified with your initials.
21. Click **Done**.

Secure the Content Zone

Next, set the security for the content zone. You will secure by worker. With this configuration, in the shopping flow, only you will have access to the content you have created.

22. In the **Security** section, select **Secured by Worker**.
23. Click **Select and Add**.
24. In the **Select and Add: Workers** dialog box, search for your user name with last name first, for example, `student, prc25`.
25. Select the row for your user name.
26. Click **Done.**
27. Click **Save and Close**. Your Content Zone is complete.
28. Click **OK**.

Check Your Work

29. From the **Navigator**, under **Procurement**, click the **Purchase Requisitions** work area link.
30. On the **Requisitions** page, click **Shop by Category**.
31. Select the top-level category **Memory Products**.

You should see your Memory Products smart form.

32. Click the smart form.
33. Confirm that the Category and Supplier you configured in the smart form are correct.
34. Confirm that your information template is displayed and functioning properly for date entry and LOV value selection.
35. Click **Done**.
36. On the **Requisitions** page, in the **Information and Tips** section, you should see your informational catalog **Memory Policies** (identified with your initials). Click the link, which will take you to the site you configured in the informational catalog. In a typical Oracle Procurement Cloud installation, it would take you to an internal HTML page containing the policy information.
37. Close the tab opened by the informational policy.

Practice Complete

You have created a content zone and added objects including catalogs and a smart form to it.

Activities for Lesson 11: Requisitions

Demonstration 11-1: Requisitions

Overview

In this demonstration, you will enter requisition preferences, and show students the basic navigation and layout of the Requisitions page.

Prerequisites

None

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Steps

Review the Requisitions Page

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. Review the tasks available from the global header region of the **Requisitions** page.
   - You can click each of the links to display to the students.
   - Where needed click **Done** or **Cancel** to close and return to the **Requisitions** page.

Task	Function
Shop by Category	Browse for items by selecting a category. Expand a category to locate items in the catalog.
Search	Perform a simple catalog search by entering in search criteria, such as **laptop**.
More Tasks > Enter Requisition Line	Enter requisition lines to request items in the catalog.
More Tasks > Request Noncatalog Item	Request items not found in the catalog.
More Tasks > Request New Supplier	Request a new supplier and submit to the supplier registration approval process.
More Tasks > Update Preparer and Requester	Change the requisition preparer or requester.
More Tasks > Update Requisition	Specify, view and update requisitioning business

Preferences	unit, delivery location and charge account information.
Manage Requisitions	Search for, view and manage your requisitions.
Shopping Lists	Request items placed on public or personal shopping lists. Also maintain your own personal shopping lists.
Shopping Cart	Add items to your requisition by adding them to your shopping cart. Locate items to add to the cart in various ways, including browsing by category, searching, viewing a shopping list, and viewing recent purchases. From the shopping cart you can review the contents, remove items, or submit the requisition. Don't submit the requisition just yet.
Shopping Cart - Review	From the shopping cart, click **Review**. Demonstrate various changes that can be made such as modifying quantities. Change **Deliver-to Location Type** to One Time to enter a one-time delivery address.

3. Review the functions available in the additional sections of the **Requisitions** page.

Section	**Function**
Purchasing News	View your organization's current news information added by the catalog administrator.
Recent Requisitions	View status and information for your recently created requisitions.
Recent Purchases	View status and information for your recent purchases.
Top Categories	View items in categories set up by the catalog administrator as top categories.
Request Forms	Use request forms created by the catalog administrator to request noncatalog items.
Information and Tips	View information added to the informational catalog by the catalog administrator.
Recently Viewed	Quickly access recently viewed items, request forms, and information and tips.

Requisition Line Entry for a Catalog Item

4. On the **Requisitions** page, from the **More Tasks** menu, select **Enter Requisition Line**.
5. On the **Enter Requisition Line** page, from the **Line Type** list, select **Goods**.
6. In the **Item** field, click **Search**.
7. In the **Search and Select: Item** dialog, in the **Description** field**,** enter: `color`.
8. Click **Search**.
9. Select the line for the **Color Inkjet Printer - AS65005**, and click **OK**.
   Note that much of the information in the **Enter Requisition Line** page is populated.
10. Click **Add to Cart**.
11. Click the **Shopping Cart** icon and note the contents of the cart display in a dialog box.
12. Click **Done** without submitting the requisition.

Shopping Lists

13. On the **Requisitions** page, click the **Shopping Lists** link.
14. Click the public shopping list link **New Employee Office Kit**.
15. Note that you can add items to the shopping list, and that you can add items from the shopping list to the cart.
16. Click **Done.**

Request Forms

17. On the **Requisitions** page, in the **Request Forms** section, note that the available links to request forms are for smart forms created by the catalog administrator.
18. Click the link **Can't find what you need, click here**.
19. On the **Create Request** page, note that the request form is designed to facilitate ordering office supplies that you can't find in the catalog, and that many fields on the request form are populated from the smart form.
20. Click the **Request Type** menu to display the request form options, and select one of the request form options.

    Note that many of the fields from the smart form are now populated on the request form. Also note that you can add an item from the request form to a shopping list or to the cart.
21. Click **Done** without adding to the requisition.

Noncatalog Request

22. On the **Requisitions** page, select **Request Noncatalog Item** from the **More Tasks** menu.
23. On the **Create Noncatalog Request** page, select the **Item Type** drop-down to display the billed by amount and billed by quantity options.
24. Note the required fields.
25. Note that you can add the noncatalog request to a shopping list or to the cart.
26. Click **Done** without adding the noncatalog request to the requisition.

Demonstration Complete

You have demonstrated the basic navigation and layout of the Requisitions page.

Practice 11-1: Creating a Requisition

Overview

In this practice, you'll use the Purchase Requisitions work area to search for laptop computers, compare search results, and add a laptop to a requisition. Then you'll browse catalog categories and add a printer to the requisition, and split the printer billing between two departments. You'll also add a noncatalog request for a whiteboard to the requisition.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Requires setting of requisition preferences done in Practice 11-1: Updating Requisition Preferences.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

Search for and Add Laptop to Requisition

1. From the **Navigator**, under **Procurement**, click the **Purchase Requisitions** work area link.
2. On the **Requisitions** page, perform a simple search for a laptop computer by entering `laptop` in the **Search** field.
3. Click the **Search** button.

   The search results return several laptops. Next, you will compare two laptops.

   Note: You can compare up to five items.
4. On the **Search Results** page, for each of the following laptops, click the **More Tasks** icon and select **Add to Compare**:
   - 14" laptop
   - 10" Notebook
5. Notice both laptops are added to the **Compare Products** tray.
6. Click the **Compare** button in the **Compare Products** tray.
7. Click the **Add to Cart** button for the 14" laptop.
8. Notice the laptop is added to the **Shopping Cart**.
9. Click **Done** on the **Compare Items** page.

Browse for and Add Printer to Requisition

10. On the **Search Results** page, click the **Clear** button for the **Compare Products** tray.
11. On the **Search Results** page, expand the **Shop by Category** link.

    Notice that various catalog categories are visible including Office Supplies, Office Technology, Services, and Telecommunications.
12. Expand the **Office Technology** category.
13. Click the **Printers** category.

14. For the **HP OfficeJet Pro 8210 Wireless Printer**, click the **Add to Cart** button.

    Notice that the printer was added to the **Shopping Cart**.

    Note: At this point, you remember want the printer shipped to your home, so you need to change the deliver-to location to a one-time address.
15. Click the **Shopping Cart icon,** and in the dialog box, click **Review**.
16. On the **Edit Requisition** page, in the **Requisition Lines** section, select the line for the printer.
17. In the **Line Details** section, from the **Deliver-to Location Type** list, select **One Time**.

    Enter a one-time address in the **Deliver-to Address** field. For example, enter your home address.

    The printer purchase cost is split between your department and corporate marketing, so you will split the accounting charge.
18. In the **Billing** section, change the **Percentage** field for the charge line from **100** to **50**.
19. Click the **Split** icon to add a second charge line.
20. Click the **Select: Charge Account** icon for the **Charge Account** field on the newly added charge line.
21. In the **Charge Account** dialog box, click **Reset** to clear out the default values. Click **Yes** to confirm.
22. Set:

Company	`101`
Line of Business	`10`
Account	`63180`

23. Click **Search**.
24. In the **Charge Account** dialog box, select the row that contains the following values:

    (**Hint:** It should be the first line in the results.)

    Company: 101

    Line of Business: 10

    Account: 63180

    Cost Center: 466

    Product: 000

    Intercompany: 000
25. Click **OK**. Notice the **Charge Account** field is filled with the value 101.10.63180.466.00.000, and the **Percentage** field is set to 50.

Add Noncatalog Request for Whiteboard to Requisition

26. Next, you need a whiteboard for your office. Click **Shop**.
27. On the **Requisitions** page, perform a search for whiteboard.
28. In the **Search Results** page, no whiteboard is found that meets your needs. Click the **Cannot find what you need – click here** link to open a request form.
29. On the **Create Request** page, you'll use the request form to enter a noncatalog request for a whiteboard.
30. Set:

Item Description	`8x4 whiteboard`

Category Name	`Office Supplies`
Quantity	`1`
UOM Name	`Ea`
Price	`199`

31. Click **Add to Cart**.
32. Click the **Shopping Cart** icon, and click **Submit** on the dialog box.
33. The **Confirmation** dialog box confirms that your requisition was submitted. Record your requisition number, and then click **OK**.

Practice Complete

You have searched for and added catalog and noncatalog items to a requisition, and split the billing for an item.

Practice 11-2: Duplicating a Requisition

Overview

In this practice, you will duplicate the requisition you created in the previous practice.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses the requisition created in Practice 11-1: Creating a Requisition.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. On the **Requisitions** page, click the **Manage Requisitions** link.
3. On the **Manage Requisitions** page, in the **Search Results** section, select the requisition you created in Practice 11-1: Creating a Requisition.
4. From the **Actions** menu, select **Duplicate**.
5. On the **Edit Requisition** page, click **Submit**.
6. The **Confirmation** dialog box confirms that your requisition was submitted. Click **OK**.

Practice Complete

You have duplicated a requisition.

Practice 11-3: Reassigning a Requisition

Overview

In this practice you will reassign the first requisition you created to another person.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses the requisition created in Practice 11-1: Creating a Requisition.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. On the **Requisitions** page, click the **Manage Requisitions** link.
3. In the **Search Results** region, open the requisition you created in Practice 11-1: Creating a Requisition by clicking the requisition number.
4. On the **Requisition** page, from the **Actions** button at the top of the page, select **Reassign**.
5. In the **Reassign Requisition** dialog, enter `Roth, Calvin` in the **Reassign To** field.

   Note: You must use the format: Last Name, First Name.
6. Click **OK**.
7. The **Confirmation** dialog box confirms that your requisition was submitted. Click **OK.**
8. On the **Manage Requisitions** page, notice the requisition was removed from the **Search Results** region.

Practice Complete

You have reassigned a requisition.

Practice 11-4: Canceling Requisition Lines

Overview

In this practice, you will cancel the requisition line for the printer on your remaining requisition.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses the duplicate requisition created in Practice 11-2: Duplicating a Requisition.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. Click the **Manage Requisitions** link in the global header region of the **Requisitions** page.
3. On the **Manage Requisitions** page, in the **Search Results** region, click the requisition number for the requisition you created in Practice 11-2: Duplicating a Requisition .
4. On the **Requisition** page, in the **Requisition Lines** section, select the printer requisition line.
5. From the **Actions** menu, select **Cancel**.
6. In the **Cancel** dialog box, in the **Reason** field enter `No longer needed`.
7. Click **OK**.
8. The **Confirmation** dialog box confirms that your requisition was submitted. Click **OK**.
9. Click **Done**.
10. Click **Done** again.

Practice Complete

You have canceled a requisition line.

Practice 11-5: Withdrawing and Editing a Requisition Pending Approval

Overview

In this practice, you will create and submit a requisition for a quantity of 2 each of a whiteboard. Then you will withdraw and edit the requisition while it is in pending approval status, to change the quantity to 1 each.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. On the **Requisitions** page, perform a simple search by entering `whiteboard` in the **Search** field, and then clicking the **Search** button.
3. On the **Search Results** page, click the **Can’t find what you need - click here** link.
4. On the **Create Request** page, set:

Item Description	`whiteboard`
Category Name	`Office Supplies`
Quantity	`2`
UOM Name	`Ea`
Price	`99.00`

5. Click **Add to Cart**.
6. Click the **Shopping Cart** icon, and in the dialog box click **Submit**.
7. On the **Confirmation** dialog box, click **OK**.
8. Click **Done**.
9. On the **Requisitions** page, click the **Manage Requisitions** link.
10. On the **Manage Requisitions** page, locate the row for your new requisition and click the requisition number to open it.
11. On the **Requisition** page, from the **Actions** button, select **Edit**.
12. On the **Edit Requisition** page, change the whiteboard **Quantity** from **2** to **1**.
13. Click **Submit**.
14. The **Confirmation** dialog box confirms that your requisition was submitted. Click **OK**.

Practice Complete

You have withdrawn and edited a requisition while in pending approval status.

Practice 11-6: Creating and Modifying an Approved Order

Overview

In this practice, you'll create a purchase requisition, and then modify the purchase order after it has been generated and approved by creating a change order.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the student number assigned to you).

Steps

Create Purchase Requisition

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. On the **Requisitions** page, in the **Search** field, enter `step ladder`.
3. Click the **Search** icon.
4. On the **Search Results** page, update the **Quantity** field to **2** for the **Stop-Step 4-Step Ladder**.
5. Click the **Add to Cart** icon.
6. Click the **Shopping Cart** icon, and on the dialog box click **Review**.
7. From the **Deliver-to Location Type** list, select **One Time**.
8. Enter `123 Main Street` in **Address Line 1**.
9. In the **City** field search for and select **Seattle** in **King, WA.**
10. Click **Submit**.
11. You will receive a confirmation that your requisition was submitted.
    Write down your requisition number _________.
12. On the **Confirmation** dialog box, click **OK**.
13. Click the **Manage Requisitions** task.
14. On the **Manage Requisitions** page, in the **Search Results** section verify that the **Status** for the requisition is **Approved** and that the **Order** column contains an order number..
    The blanket purchase agreement for the ladder is configured so that the system will automatically generate the purchase order and approve it. This may take one or two minutes. Click **Search** as needed to refresh the **Search Results**.
15. Write down the **Order** number for the requisition: _________.
16. Click the **Order** number.
17. On the **Purchase Order** page, notice that the buyer is shown. The buyer should be Calvin Roth. The **Status** should be **Open**.
18. Click **Done**.
    Note: At this point you realize that you need more than two ladders.

Create a Change Order

15. On the **Manage Requisitions** page, select your requisition.
16. From the **Actions** button, select **Edit Order**.
17. Click **Yes** in the **Warning** dialog box. (You *do* want to create a change order on the purchase order.)
18. On the **Edit Change Order** page, in the **Description** field, enter: `Need to increase the quantity of ladders`**.**
19. In the **Lines** section, change the **Quantity** from **2** to **4**.
20. In the **Change Reason** field, enter: `Need a few more ladders for our department`**.**
21. Click **Submit** to submit the changed purchase order.
22. The **Confirmation** dialog box confirms that your change order was submitted. Click **OK**.
23. Click **Done**.

Practice Complete

You have created a purchase requisition, set a one-time delivery address, and after a purchase order was generated and approved you then modified the purchase order with a change order.

Practice 11-7: Comparing and Purchasing Between Local and Punchout Search Index Catalogs

Overview

In this practice, you will search for and compare items sourced from both local and punch out catalogs.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps

1. From the **Navigator**, under **Procurement**, click **Purchase Requisitions**.
2. In the **Search** field enter `mouse`**,** then click the **Search** icon.
3. In the **Search Results** section, locate the item: **Kensington Ergonomic Expert Mouse**.

   Note: In this instructional environment you may not be able to use the **Go to Punchout** button to access the supplier's catalog.
4. Click the **More Tasks** icon for the item, and then select **Add to Compare**.
5. In the **Search Results** section, locate the item **Optical travel mouse Black**.
6. Click the **More Tasks** icon for the item, and then select **Add to Compare**.
7. In the **Compare Products** tray, click **Compare**.
8. On the **Compare Products** page, click the **Add to Cart** icon for the item **Optical travel mouse Black**.
9. Notice the item is added to the **Shopping Cart**.
10. On the **Compare Products** page, click **Done**.
11. On the **Compare Products** tray, click **Clear**.
12. On the **Search Results** page, expand the **Shop by Category** link.
13. Expand the **Office Supplies** category.
14. Click the **Desk Supplies** subcategory.
15. Click **Add to Cart** for the item **Mini Catch All Organizer Black**.
16. Notice the item is added to the **Shopping Cart**.
17. Click the **Shopping Cart icon,** and in the dialog click **Review**.
18. On the **Edit Requisition** page, change the **Description** to `Desk supplies`.
19. Click **Submit**.
20. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have compared and purchased items from local and punchout catalogs.

Activities for Lesson 12: Purchase Orders

Demonstration 12-1: Purchase Order - Overview

Overview

This demonstration shows how to open an existing purchase order and provides an overview of the important fields for an order.

The demonstration uses an existing purchase order created by the user Calvin Roth, who is already set up as a procurement agent.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

calvin.roth

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps:

1. From the **Navigator**, under **Procurement**, click the **Purchase Orders** work area link.
2. On the **Overview** page, discuss the infolets available on the work area's landing page.
3. Click the **My Infolets** icon and discuss how a user can hide or show the available infolets on the page.
4. Click the **Tasks** tab, and click the **Manage Orders** task.
5. On the **Manage Orders** page, in the **Search** area, in the **Order** field, enter: `162173`.
6. Click **Search**.
7. In the **Search Results**, click the link for order **162173**.
8. On the **Purchase Order** page, in the **General** section of the **Main** tab, discuss the required fields, key fields, and fields that have impact downstream.
9. On the **Terms** tabbed section of the **Main** tab, discuss the key fields, and the fields that have impact downstream.
10. Click the **Notes and Attachments** subtab.

    Note there are no notes or attachments for this order.
11. In the **Lines** subtab of the **Main** tab, discuss the required fields, key fields, and the fields that have impact downstream.
12. Click the **Schedules** subtab.
13. Discuss the required fields, key fields, and fields that have impact downstream.
14. Click the **Distributions sub**tab.
15. Discuss the required fields, key fields, and fields that have impact downstream.
16. Click **Done**.

Demonstration Complete

You have provided an overview of the important fields for an existing order.

Practice 12-1: Creating a Purchase Order for Goods

Overview

You will create a purchase order for some office supplies that aren't currently part of an automated purchase flow.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents.

User Login

prcXX.student, where XX is the number of your student user.

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps:

1. From the **Navigator**, under **Procurement**, select the **Purchase Orders** work area link.

Create a New Purchase Order

2. You use the **Overview** page to perform common tasks for your purchasing documents, contract deliverables, and supplier base.

   Click the **Tasks** tab, and then click the **Create Order** task.
3. Use the **Create Order** dialog box to enter basic information about the order. Set:

Style	Purchase Order
Procurement BU	US1 Business Unit
Requisitioning BU	US1 Business Unit
Supplier	`Office Depot`

   When you enter Office Depot, notice that the information in the remaining fields is automatically populated.
4. Click the **Create** button.

Add a Line for Goods

5. Use the **Edit Document** page to edit and submit purchase orders.
   Use the **Lines** subtab to create and manage order lines.

   On the **Lines** subtab, click the **Actions** drop-down list and select: **Add Row**.
6. Set:

Description	`Big Value Paper Towels`

Category Name	`Office Supplies`
Quantity	`10`
UOM	`Ca`
Price	`29.99`

7. Click the **Schedules** subtab.
8. In **Requested Delivery Date,** enter a date two weeks from today.

Provide an Account Distribution

9. Click the **Distributions** subtab.
10. In the PO Charge Account field, enter: 101.10.60540.000.000.000.
11. Click the **Submit** button.
12. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully created a purchase order for goods.

Practice 12-2: Creating a Purchase Order for Services

Overview

You will create a purchase order for some services that are not currently part of an automated purchase flow.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents.

User Login

prcXX.student, where XX is the number of your student user.

Steps

1. From the **Navigator**, under **Procurement**, select **Purchase Orders**.

Create a New Purchase Order

4. On the **Overview** page, click the **Tasks** tab and click **Create Order**.
5. In the **Create Order** dialog box, set:

Style	Deliverable Services PO
Procurement BU	US1 Business Unit
Requisitioning BU	US1 Business Unit
Supplier	`Staffing Services`

6. Click the **Create** button.

   If you see an error about the **Supplier Name** field, clear the field and then click **Create.**

Add a Line for Services

7. Use the **Edit Document** page to edit and submit purchase orders.

   Use the **Lines** subtab of the **Edit Document** page to create and manage order lines.

   In the **Lines** subtab, click the **Add Row** icon.
8. Set:

Description	`Hardware Installation`
Category Name	`Infrastructure Services`
Price	`120.00`

9. Click the **Distributions** subtab.
10. In the **PO Charge Account** field, enter: `101.10.60540.000.000.000`
11. Click the **Submit** button.

12. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully created a purchase order for services.

Practice 12-3: Creating a Purchase Order from a Catalog

Overview

You will create a purchase order for some goods in the procurement catalog that aren't currently part of an automated purchase flow.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents.

User Login

prcXX.student, where XX is the number of your student user.

Steps

1. From the **Navigator**, under **Procurement**, select **Purchase Orders**.

Create a New Purchase Order

2. On the **Overview** page, click the **Tasks** tab and click **Create Order**.
3. In the **Create Order** dialog box, set:

Style	Purchase Order
Procurement BU	US1 Business Unit
Requisitioning BU	US1 Business Unit

4. Click **Create**.

Add a Line from the Catalog

5. Use the **Lines** subtab of the **Edit Document** page to manage order lines.
6. In the **Lines** subtab, from the **Actions** list, select **Add from Catalog**.
7. Use the **Catalog** page to search catalogs for items. In the **Search** field enter: `laptop`. Click the **Search** button.
8. Click the **Add to Document** button for the **14" Laptop 1.83Mhz**.
9. Use the **Purchase Order** pane to manage items that were added to the document builder.
10. Click the **Complete** button.
11. On the **Edit Document** page, use the **Lines** subtab to enter specific information for the line.
12. In the **Quantity** field, enter: 2.
13. Click the **Schedules** subtab.
14. In the **Requested Delivery Date** field, enter a date four weeks from today.
15. Click the **Distributions sub**tab.
16. In the **PO Charge Account** field, enter: `101.10.60540.000.000.000.`
17. Click the **Submit** button.

18. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully created a purchase order from a catalog.

Practice 12-4: Duplicating a Purchase Order

Overview

You will create a purchase order just like one that you created in a prior practice. You will use the duplicate order feature to save yourself some time.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete Practice 5-1: Managing Procurement Agents. You must also have created a purchase order in Practice 12-1: Creating a Purchase Order for Goods, Practice 12-2: Creating a Purchase Order for Services or Practice 12-3: Creating a Purchase Order from a Catalog.

User Login

prcXX.student, where XX is the number of your student user.

Steps:

1. From the **Navigator**, under **Procurement**, select **Purchase Orders**.

Locate an Existing Purchase Order

2. On the **Overview** page, click the **Tasks** subtab, and click **Manage Orders**.
3. Use the **Manage Orders** page to access and process existing purchase orders.

   In the **Procurement BU** field, select **US1 Business Unit**.
4. In the **Buyer** field, select: your student user. For example: `Student, PRCXX` (where XX is the number of your student user). **Hint:** In order to see your student user in this field, they must have been set up as a procurement agent.
5. Click the **Search** button.
6. Select the row for any of your existing orders with a **Status** of **Open**. Record the purchase order number: __________.

Duplicate the Order

7. From the **Actions** menu, select **Duplicate**.
8. You can use the **Edit Document** page to make any additions or changes to this new order.

   For example, you could change the **Quantity** or **Requested Delivery Date**.
9. Click the **Schedules** subtab.
10. In the **Requested Delivery Date** enter a date one week from today.
11. If you wanted to continue and perform more work on this new order, you could click the Save button at this point, to save your work. For this practice you are ready to have the order approved.
12. Click the **Submit** button.

13. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully duplicated a purchase order.

Practice 12-5: Canceling a Purchase Order

Overview

You will cancel a purchase order that is no longer needed.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents. You must also have created a purchase order in practice 12-1, 12-2 or 12-3.

User Login

prcXX.student, where XX is the number of your student user.

Steps:

1. From the **Navigator**, under **Procurement**, click **Purchase Orders**.
2. On the **Overview** page, click the **Tasks** tab, and click **Manage Orders**.
3. Use the **Manage Orders** page to access and process existing purchase orders.

   In the **Procurement BU** field, enter: **US1 Business Unit**.
4. In the **Buyer** field, select: your student user. For example: `Student, PRCXX` (where XX is the number of your student user).

   Hint: In order to see your student user in this field, they must have been set up as a procurement agent.
5. Click the **Search** button.
6. Select and open any of your existing orders with a **Status** of **Open**.

   For example, open the original order that you duplicated in the previous practice.

   Note: You could also find the purchase order using the order number in the Search area.
7. On the **Purchase Order** page, view the details for the order and verify your selection.
8. Record the purchase order number: __________.

Cancel the Document

9. From the **Actions** menu, select **Cancel Document**.
10. In the **Cancel Document** dialog box:
    - Provide a reason for the cancellation.
    - Optionally, select the communication method to notify the supplier.
    - Optionally, select the acknowledgement level agreed upon with this supplier.
11. Click the **OK** button.
12. On the Confirmation dialog box, click **OK**.
13. Click **Done**.

    You have successfully canceled a purchase order.

Verify the Document is Canceled

14. From the **Overview** page, click the **Search** tab, and select **Orders** from the **Search** list.
15. Enter your order number in the **Search** field.
16. Click the **Search** icon.
17. On the **Purchase Order** page, verify the status of the canceled order.
18. To view the document history, from the **Actions** menu, select **View Document History**.
19. Notice that the application initiated a change order and then canceled the document.
20. Click **Done** and then click **Done** again.

Practice Complete

You have canceled a purchase order and verified the document is canceled.

Practice 12-6: Creating a Purchase Order Using Process Requisitions

Overview

You will use the Process Requisitions feature to review and manually process requisitions into purchase orders. You will use the items you uploaded by file to a blanket agreement in lesson 9-4.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete Practice 5-1: Managing Procurement Agents and Practice 9-4: Creating and Uploading Lines to a Blanket Purchase Agreement.

User Login

prcXX.student, where XX is the number of your student user.

Steps:

1. From the **Navigator**, under **Procurement**, select **Purchase Requisitions**.

Create a Requisition

2. From the **Requisitions** page you will create two new requisitions using the items you uploaded by file to your blanket agreement in a previous practice.

   Enter `XX-Folding` in the **Search** field, where the XX is replaced with your student user number.
3. Click **Search**.
4. For the **53” Table** (cost $499.00), click the **Add to Cart** icon.
5. For the **57” Table** (cost $699.00), click the **Add to Cart** icon.
   Notice the two items are added to the **Shopping Cart**.
6. Click the **Shopping Cart** icon and in the dialog click **Review**.
7. On the **Edit Requisition** page, scroll down and verify in the **Line 1 Details** section that the **Suggested Buyer** is your student user. This is critical because that is the buyer to which the requisition lines will be sent to for processing.

   If your user is not defaulted into the field, then manually enter your student user name. For example: `Student, PRCXX`.

   Hint: In order to see your student user in this field, they must have been set up as a procurement agent in a previous practice.
8. In the **Requisitions Lines** section, select the Line 2 row and repeat the instructions in step 7 for the **Line 2 Details** section.
9. Click **Submit**.
10. Record the requisition number: __________.
11. Click **OK**.

Duplicate the Requisition

12. You will now duplicate the requisition you just created.

    On the **Requisitions** page, click the **Manage Requisitions** link.
13. On the **Manage Requisitions** page, in the **Search Results** section, select the row for the requisition you just created.
14. From the **Actions** menu, click **Duplicate**.
15. On the **Edit Requisition** page, repeat the instructions from steps 7 and 8 to ensure the buyer for each requisition line is set to your student user.
16. Click **Submit**.
17. Record the requisition number: __________.
18. Click **OK**.

Process Requisitions into a Purchase Order

19. From the **Navigator**, under **Procurement**, select **Purchase Orders**.
20. On the **Overview** page, click the **Tasks** tab, and then click **Process Requisitions**.
21. On the **Specify Procurement BU** dialog box, in the **Procurement BU** field, select **US1 Business Unit**.
22. Click **OK**.
23. On the **Process Requisitions** page, in the **Requisitioning BU** field, enter: `US1 Business Unit`.
24. Click **Search**.
25. In the **Search Results**, notice all the open requisitions and their lines.

    In the following steps, you will select lines from the two requisitions you created earlier in this practice and use the grouping feature while making a purchase order.

    Note: Be sure to use your requisition numbers and do not use other student's requisitions.
26. Select both lines from your first requisition. Press **Shift** and **Click** on each of the requisition lines to select them.
27. Click the **Add to Document Builder** button.
28. In the **Add to Document Builder** dialog box, click the **OK** button.
29. Notice the **Document Builder** pane is updated to show the two requisition lines.
30. Select both lines from your second requisition. Press the **Shift** and **Click** on each of the requisition lines to highlight them.
31. Click the **Add to Document Builder** button.
32. Notice there are now four lines in the **Document Builder** pane.
33. As needed, scroll to bottom of **Document Builder** pane so the **Edit/Create/Clear** buttons are visible, and click the **Edit** button.
34. On the **Edit Document Builder: New Order** page, in the **Document Builder Lines** section, note there are 4 numbers under the **Order Line** column, but that only two purchase order lines will be created.
35. The application has grouped similar items from the requisition for you, based on the source agreement attributes. You could override this by choosing a different option in the **Actions** menu.

Create the Purchase Order.

36. Click the **Create** button.
37. In the **Information** dialog box, click **OK**.
38. On the **Edit Document (Purchase Order)** page, click **Submit**.
39. Record the purchase order number: __________. It is used in the next practice.
40. On the **Confirmation** dialog box, click **OK**.
41. Click **Done**.

Practice Complete

You have successfully processed uploaded requisition lines into two requisitions, and processed the two requisitions into a purchase order.

Practice 12-7: Creating a Change Order

Overview

You will use the change order feature to make changes to the purchase order you created in the previous practice, Practice 12-6: Creating a Purchase Order by Using Process Requisitions.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practices 5-1: Managing Procurement Agents, 9-4: Creating and Uploading Lines to a Blanket Purchase Agreement and 12-6: Creating a Purchase Order by Using Process Requisitions.

User Login

prcXX.student, where XX is the number of your student user.

Steps:

1. From the **Navigator**, under **Procurement**, select **Purchase Orders**.

Select an Existing Open Purchase Order

2. On the **Overview** page, click the **Tasks** tab, and then click **Manage Orders**.
3. Use the **Manage Orders** page to search for the purchase order you created from processing requisitions in the prior practice. In the **Search** section, from the **Procurement BU** list, select **US1 Business Unit**.
4. In the **Buyer** field, enter your user, for example `Student, PRCXX`.
5. Click the **Search** button.
6. In the **Search Results**, locate and open the purchase order you created in the last practice.

Make Changes to Purchase Order

7. In the **Purchase Order** page, from the **Actions** list, select **Edit**.
8. In the **Warning** dialog box, click **Yes** to proceed.
9. On the **Edit Change Order** page, begin by documenting the changes you are making. In the **Description** field enter: `Adjust quantity and payment terms per team review`.
10. Update the **Payment Terms** field: choose a different value from the drop-down list.
11. Scroll down the screen to the **Lines** subtab.
12. Update the **Quantity** value for **Line 1**: from 2 to: 3.
12. Click the **Distributions** subtab.
13. Update the **Quantity** value for the first row from 1 to: 2.
14. Click the **Save** button. (Do not choose **Save and Close**.)

Review Your Changes

15. On the **Edit Change Order** page, from the **Actions** list (next to the **Save** button), select **Review Changes.**
16. On the **Review Changes** page, notice that the application uses blue dots to indicate where changes are made to the purchase order.
17. Click the **Done** button.
18. On the **Edit Change Order** page, from the **Save** list, select **Save and Close**.
19. On the **Confirmation** dialog box, click **OK**.
20. Click the **Manage Orders** tab.
21. Search on your purchase order number again to refresh the page and the order status.
22. In the **Search Results** section, locate the row for your order. Notice the following:
    - The purchase order is still in **Open** status. This means that receipts and invoices are not withheld while there is a change order in process.
    - There is an **Information** (i) icon next to the purchase order number.
    - The **Change Order** column has a value under it to indicate a change order is in process.
23. Hover over the **Information** icon. (Do not click on the icon yet.)

    Notice bubble text stating, "**A change order is pending.**"
24. Click the **Information** icon.

    The **Information** dialog box displays link text stating, "**A change order is pending.**"
25. To view the change order details, click the link text in the dialog.
26. On the **Change Order** page, review the details of the changes made to the purchase order.

Submit Your Changes for Approval

27. On the **Change Order** page, from the **Actions** list, select **Edit**.
28. On the **Edit Change Order** page, click the **Submit** button.
29. On the **Confirmation** dialog box, click **OK**.
30. Click **Done**.
31. Click the **Manage Orders** tab.
32. Search on your purchase order number again to refresh the status.
33. In the **Search Results**, locate your purchase order and click the order number link.
34. On the **Purchase Order** page, from the **Actions** menu, select **View Revision History**.
35. On the **Revision History** page, review the revision details, then click **Done**.
36. On the **Purchase Order** page, click **Done**.
37. On the **Manage Orders** page, click **Done**.

Tip: The Purchase Order Change Order Template determines which attributes are controlled by a change order, and can be configured by your organization.

Practice Complete

You have created a change order for the purchase order you created in the previous practice.

Activities for Lesson 13: Self-Service Receiving

Demonstration 13-1: Overview of Self-Service Receiving

Overview

Create a requisition. Demonstrate how to locate and view requisitions and receive them, creating a receipt.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Steps

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Create Your Requisition

1. From the **Navigator**, under **Procurement**, select the **Purchase Requisitions** work area link.
2. On the **Requisitions** page, click **Shop by Category**.
3. Expand **Office Technology** and then expand **Printers**.
4. Click the **LaserJet Pro 400M401n Laser Printer**.
5. On the **Product Details** page, click **Add to Cart**.
6. Click the **Shopping Cart** icon.
7. Click the **Submit** button to submit the requisition.
8. Record your requisition number: ________________.
9. On the **Confirmation** dialog box, click **OK**.
10. On the **Requisitions** page, click **Manage Requisitions**.
11. On the **Manage Requisitions** page, in the **Search** section, in the **Requisition** field, enter your requisition number.
12. Click the **Search** button.
13. In the **Search Results** section, confirm that the status of the requisition is Approved. (It may take 1-2 minutes to be approved.)
14. Click **Done**.

Receive Your Requisition

15. From the **Navigator**, under **Procurement**, click the **My Receipts** work area link.
16. On the **Receive Items** page, in the **Search** section, in the **Requisition** field, enter your requisition number.

17. From the **Items Due** list, select **Any Time**.
    - From the **Requisitioning BU** list, select **US1 Business Unit**.
18. Click the **Search** button.
19. Select the line for LaserJet Pro printer from Lee Supplies.
    Note that the Receive button is now active.
20. Click the **Receive** button.
21. On the **Create Receipts** page, you can enter the quantity received as well as the Waybill and Packing Slip identifiers.
22. Click the **Show Receipt Quantity** button to default the full receipt quantity.
23. Enter example values for the Waybill and Packing Slip fields, such as `1234` and `5678`.
24. Click the **Submit** button to process the receipt.
25. On the **Confirmation** dialog box, click **OK**.

Demonstration Complete

You have demonstrated how to create, locate, and receive a requisition, creating a receipt.

Practice 13-1: Receiving Your Requisition

Overview

To complete the purchasing process, you will use self-service receiving to create a receipt for one of your earlier requisitions.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Uses the purchase order created in Practice 12-6: Creating a Purchase Order by Using Process Requisitions, and modified in Practice 12-7: Creating a Change Order.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps:

1. From the **Navigator**, under **Procurement**, click the **My Receipts** work area link.
2. On the **Receive Items** page, from the **Items Due** list, select **Any Time**.
3. From the **Requisitioning BU** list, select **US1 Business Unit**.
4. Click the **Search** button.
5. Select one of your requisition lines from a prior practice and click the **Receive** button.
6. On the **Create Receipts** page, click the **Show Receipt Quantity** button to default the receipt quantity, or enter 1 for Quantity.
7. Click the **Submit** button to process the receipt.
8. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have created a receipt.

Practice 13-2: Creating a Requisition and Receiving Goods and Services Through Self-Service Receiving

Overview

You are a new employee with the company and have just received training on Oracle Self Service Procurement Cloud's self-service receiving capabilities. You have arrived in your office and realize you need to order some pens. You also notice that your office needs to be cleaned. You want to create a requisition to order a quantity of 10 ballpoint pens. On the same requisition, you also want order cleaning services for your office.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prcXX.student (where XX is the student number assigned to you)

Steps:

Create Your Requisition

1. From the **Navigator**, under **Procurement**, click the **Purchase Requisitions** work area link.
2. On the **Requisitions** page, expand **Shop by Category**, and click the **Office Supplies** category.
3. On the **Search Results** page, locate **Round Stic Ball Point Pen, Fine, Blue**.
   You need to order pens for your office and need to create a requisition for a quantity of 10 ballpoint pens. Enter a quantity of 10.
4. Click the **Add to Cart** icon. 
5. Click **Done**. The next step is to add a fixed-price service line to the requisition.

   You can use fixed-price line types when you want to order general business services by a fixed amount. In our example, you need to create a requisition for a fixed price service for office cleaning.

   On the **Requisitions** page, in the **Request Forms** section, click **Facility Services – Fixed Price**.
6. On the **Create Request** page, verify that the request type is **Facility Services – Fixed Price**.
7. In the **Item Description** field, enter: `XX-Office Cleaning Service`.
8. Click the **Add to Cart** button.
9. Click the **Shopping Cart** icon. Confirm that the requisition has two lines: the first line is for XX-Office Cleaning Service, and the second line is for the Round Stic pens.

   After you have confirmed the two lines have been correctly added to the requisition, click the **Review** button.

10. On the **Edit Requisition** page, in the **Requisition Lines** section, from the **View** menu, select **Columns** and ensure that **Line Type** is selected.
11. Confirm that the requisition includes two lines.
    Line 1 has a **Line Type** of **Goods**, representing the offices supplies.
    Line 2 has a **Line Type** of **Fixed Price Services**, representing the cleaning service.
12. Click the **Submit** button to process the requisition.
13. Record your requisition number ________________.
14. On the **Confirmation** dialog box, click **OK**.
15. On the **Requisitions** page, click the **Manage Requisitions** link.
16. On the **Manage Requisitions** page, use your requisition number to search for the requisition you just created.
17. Confirm in the search results that the **Requisition Status** is Approved.
18. Click **Done**.

Receive Your Requisition

19. From the **Navigator**, under **Procurement**, click the **My Receipts** work area link.
20. On the **Receive Items** page, from the **Items Due** list, select **Any Time**.
21. From the **Requisitioning BU** list, select **US1 Business Unit**.
22. In the **Requisition** field, enter the requisition number of the requisition you created earlier.
23. Click the **Search** button.
24. Two lines are available to be received:

    Line 1 is for your pens, and Line 2 is for your office cleaning service.

    Note: Line 1 is sourced from Office Depot, and Line 2 is sourced from JGA.

    You must receive each line independently.
25. Select the first line, and then click the **Receive** button.
26. On the **Create Receipts** page, click the **Show Receipt Quantity** button to default the full receipt quantity.
27. Click the **Submit** button to process the receipt.
28. On the **Confirmation** dialog box, click **OK**.
29. You will be returned to the **Receive Items** page. One line remains available for receipt.
30. Select the XX-Office Cleaning Service line, and then click the **Receive** button.
31. On the **Create Receipts** page, the quantity of 200 is automatically defaulted.

    Note: This line is for a Fixed Price Service. There is no UOM specified because this is an amount-based receipt, as opposed to a quantity-based receipt.
32. Click the **Submit** button to process the receipt.
33. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have created a requisition for pens and for a fixed-price service line item (cleaning services). You have received the requisition and created a receipt.

Activities for Lesson 14: Setting Up and Managing Supplier Qualification Management

Demonstration 14-1: Using Basic Functionality

Instructor Note: The instructor should demonstrate Practice 14-1: Using Basic Functionality. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 14-2: Using Initiatives

Instructor Note: The instructor should demonstrate Practice 14-2: Using Initiatives. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 14-3: Setting Up Lookups for Supplier Qualification

Instructor Note: In the steps for this demonstration, wherever you see **INS-XX**, for **XX** enter the number of your instructor user. For example, for users with the **prc00.instructor** username would enter **INS-00**. This will allow this demonstration to be performed by multiple instructors within the same environment, if necessary.

Overview

In this demonstration, you will perform setup tasks for lookups to be used in Supplier Qualification.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Requires that the role update described in Practice 1-3: Updating the PRC_ALL role has been performed.

Steps:

Creating Subject Lookup Values

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, select the **Supplier Qualification** functional area.
4. Open the **Manage Subject Lookup** task.
   Hint: To see the task set the **Show** field to **All Tasks**.
5. On the **Manage Subject Lookup** page, in the **POQ_SUBJECT: Lookup Codes** section, use the **Add New** icon to insert two new rows and display the input fields for the subject lookup codes. Enter the following example data:

Lookup Code	Display Sequence	Enabled	Start Date	Meaning	Description	Tag
`INS-XX Environmental`	`98`	Selected	Enter today's date	`INS-XX Environmental Meaning`	`INS-XX Environmental Description`	`INS-XX Environmental Tag`

INS-XX Hazard	99	Selected	Enter today’s date	INS-XX Hazard Meaning	INS-XX Hazard Description	INS-XX Hazard Tag

6. When you have finished entering data, click **Save and Close**.

Creating Standards Organization Lookup Values

7. On the **Setup: Procurement** page, in the **Supplier Qualification** functional area, open the **Manage Standards Organization Lookup** task.
8. On the **Manage Standards Organization Lookup** page, in the **POQ_STDS_ORG: Lookup Codes** region, use the **Add New** icon to insert new rows and display the input fields for the standards organization lookup codes. Enter the following example data:

Lookup Code	Display Sequence	Enabled	Start Date	Meaning	Description	Tag
INS-XX IEEE-SA	98	Selected	Enter today’s date	INS-XX IEEE-SA Meaning	INS-XX IEEE-SA Description	INS-XX IEEE-SA Tag
INS-XX OASIS	99	Selected	Enter today’s date	INS-XX OASIS Meaning	INS-XX OASIS Description	INS-XX OASIS Tag

9. When you have finished entering data, click **Save and Close.**

Reviewing Assessment Outcome Lookup Values

10. On the **Setup: Procurement** page, in the **Supplier Qualification** functional area, click the **Manage Assessment Outcome Lookup** task.
11. On the **Manage Assessment Outcome Lookup** page, in the **POQ_ASSESSMENT_OUTCOME: Lookup Codes** region, review the assessment outcome lookup codes already populated in the table.
12. When you have finished reviewing data, click **Cancel.**

Demonstration Complete

You have successfully configured lookups for Supplier Qualification.

Demonstration 14-4: Creating a Registration Rule Set

Instructor Note: The instructor should demonstrate the practice number 14-3. Use the prc00.instructor login instead of the prcXX.student login.

Practice 14-1: Using Basic Functionality

Instructor Note: The instructor should demonstrate this practice first, as demonstration number 14-1. Use the prc00.instructor user login instead of the prcXX.student user login.

Overview

In this activity you'll create qualification objects, and use them when creating an initiative. First you'll create a question, a qualification area, and a qualification model. Then you'll use these to create a qualification initiative. Finally, you'll invite suppliers and launch the initiative.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practice 5-1: Managing Procurement Agents.

User Login

prcXX.student (where XX is the number of the student user assigned to you)

Steps

Create a Question

1. From the **Navigator**, under **Procurement**, click the **Supplier Qualification** work area link.
2. On the **Overview** page, click the **Tasks** tab and click the **Manage Questions** task.
3. On the **Manage Questions** page, in the **Search Results** section, click the **Create** icon.
4. On the **Create Question** page, enter the following information:

Question	This is the name of the question. Enter your sign-on prefix and Q1**,** for example, `Prc25 Q1`
Question Level	Supplier
Responder Type	Supplier
Mapped to supplier attribute	Deselected
Question Type	Multiple choice with single selection
Question Text	How long has your company been in business?

5. In the **Acceptable Responses** section, for each row in the table below, click the **Add Response** icon and enter the following information:

Display Sequence	Response Text	Response Attachments	Edit Question Branching
10	0-2	Optional	No (default)
20	3-10	Optional	No (default)
30	More than 10	Optional	No (default)

6. Click the **Activate** button.
7. Click **Save and Close.**
8. On the **Confirmation** dialog box, click **OK**.
9. On the **Manage Questions** page, click **Done**.

Create a Qualification Area

10. On the **Overview** page, click the **Tasks** tab and click the **Manage Qualification Areas** task.
11. On the **Manage Qualification Areas** page, in the **Search Results** section, click the **Create** icon.
12. On the **Create Qualification Area: Overview** page, notice you are on the **Overview** tab.

    Enter the following information:

Qualification Area	Use your sign-on prefix then Area 1**,** for example `PRC25 Area 1`
Description	`Company History`
Information Only box	Leave unselected (information only areas do not have any outcomes defined)
Procurement BU (the BU that owns and can update this qualification area)	US1 Business Unit (if not already defaulted)
Expiration Reminder	10 Days

13. Click the **Questions and Outcomes** tab.
14. On the **Create Qualification Area: Questions and Outcomes** page, in the **Questions** section, use the question you defined earlier.

    From the **Actions** menu, click **Select and Add**.
15. On the **Select and Add: Questions** dialog box, search for and select your question. For example, search for **PRCXX Q1**, where XX is the number of your student user.
16. Click **OK**.

17. In the **Qualification Area Outcomes** section, click the **Add** icon to generate rows and define the possible outcome judgments for this question's answers. Use the information in the following three tables.

Display Sequence	10
Outcome	Excellent

Display Sequence	20
Outcome	Average

Display Sequence	30
Outcome	Poor

18. Click **Activate**
19. Click **Save and Close**.
20. On the **Confirmation** dialog box, click **OK**.
21. On the **Manage Qualification Areas** page, click **Done**.

Create a Qualification Model

22. On the **Overview** page, click the **Tasks** tab and click the **Manage Qualification Models** task.
23. On the **Manage Qualification Models** page, in the **Search Results** section, click the **Create** icon.
24. On the **Create Qualification Model: Overview** page, set:

Qualification Model	Use your sign-on prefix and then Model 1, for example, `PRC25 Model 1`
Description	`Company History Model 1`
Procurement BU (this is the BU that owns and can update this area definition)	US1 Business Unit (if not already defaulted)
Expiration Reminder	`10` Days

25. Click the **Areas and Outcomes** tab.
26. On the **Create Qualification Model: Areas and Outcomes** page, in the **Qualification Areas** section, add the area you just created.

    From the **Actions** menu, click **Select and Add.**
27. In the **Select and Add: Qualification Areas** dialog box, search for your qualification area.
28. Highlight the row in the search results, and then click **OK**.
29. On the **Create Qualification Model** page, click **Activate**.
30. Click **Save and Close**.
31. On the **Confirmation** dialog box, click **OK**.
32. Click **Done**.

Create an Initiative

The basic building blocks for your initiative are created. Now you need to leverage the data in an initiative. You'll create a qualification initiative, not an assessment initiative. This will work because a supplier can have multiple qualifications, but only one assessment.

33. On the **Overview** page, click the **Tasks** tab and click the **Create Initiative** task.
34. On the **Create Initiative** dialog box, enter the following information:

Type	Qualification
Procurement BU	US1 Business Unit
Title	Use your sign-on prefix and then Initiative1, for example, `PRC25 Initiative 1`

35. Click **Create**. (Write down the number of your initiative __________. You will need it in the next activity).
36. On the **Edit Initiative: Overview** page, on the **Qualifications** tab, in the **Qualification Areas** section, click the **Add** icon to add a qualification area.
37. In **Qualification Area**, select the qualification area you created earlier in this practice, for example **PRC25 Area 1.** (**Hint:** you can type in the first few letters and the application will suggest possible options).
38. Optionally, you can enter an evaluation due date.
39. You will now add the suppliers that will receive notifications to fill out the questionnaire.
    In the **Suppliers** section, click **Search and Add.**
40. On the **Overview: Add Suppliers** page, in the **Supplier** field, enter **Lee Supplies** and click **Search**.
41. From the search results, highlight the row for **Lee Supplies** and click **Add to Selection**.
42. On the **Confirmation** dialog box, click **OK**.
43. Click **Continue**.
44. On the **Edit Initiative** page, in the **Suppliers** section, on the row for **Lee Supplies**, in the **Supplier Site** field, enter **Lee US1**.
45. In the **Supplier Contact** field, enter: `Lee, Ryan`.
46. To add another supplier, click **Search and Add**.
47. On the **Overview: Add Suppliers** page, in the **Supplier** field enter: `Staffing Services`.
48. Click **Search**.
49. In the **Search Results** section, highlight the row for **Staffing Services** and click **Add to Selection**.
50. On the **Confirmation** dialog box, click **OK**.
51. Click **Continue**.
52. On the **Edit Initiative** page, you now have **Lee Supplies** and **Staffing Services** listed in the **Supplier** section.
53. In the row for **Staffing Services**, in the **Supplier Site** enter: `Staffing US1`.
54. In **Supplier Contact** enter: `Gray, Jade`.
55. These are the only two suppliers you will qualify. Click **Save**.
56. Click **Next** to go to the **Configuration** page.

On the **Configuration** page you control certain situations, such as whether to send the questionnaire to a supplier when you already have responses for some of the questions. The page presents information about current qualifications, which can be useful when you are requalifying or updating information from suppliers over time.

57. For this practice, you do not need to change anything, so click **Next** to go to the **Questionnaires** page.

    On the **Questionnaires** page, you can configure the automatically generated questionnaire for this specific initiative. You can reorder the questions and add new sections as needed. If a question is not marked as required, you can delete it.

58. Optionally, if you want to see how the questionnaire will be displayed, click **Preview**.

    You can respond to the questions on the preview page, so if you had defined any question branching, you could check that it operates correctly.
    After you have reviewed the questionnaire, click **Done**.

59. For this practice, you will not change the questionnaire, so click **Next** to go to the **Review Initiative** page.

    The **Review Initiative** page lets you review your initiative and the invited suppliers prior to launching.

60. Click **Validate** to check that you have entered all the required information. If there are any errors, return to the appropriate page and make your corrections.
61. On the **Confirmation** dialog box, click **OK**.
62. Click **Save.**
63. Click **Launch**
64. In the **Warning** dialog box, click **Yes**.
65. On the **Confirmation** dialog box, click **OK**.
66. Sign out of the application.

Practice Complete

You have created qualification objects, created a qualification initiative, invited two suppliers and launched the initiative.

At this point, questionnaires are sent to the two suppliers invited. In the next activity, you will sign on as a supplier, respond to the questionnaire, and then sign back on as the initiative creator and process the response.

Practice 14-2: Using Initiatives

Instructor Note: The instructor should demonstrate this practice first, as demonstration number 14-2. Use the prc00.instructor user login instead of the prcXX.student user login.

Overview

In this activity, you'll access the initiative you created in the prior activity. You'll sign in as a supplier and respond to the initiative. Then you'll sign back in as the initiative creator, review and accept the response and create a qualification.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete Practice 5-1: Managing Procurement Agents, and Practice 14-1: Using Basic Functionality.

User Logins

- ryan.lee
- jade.gray
- prcXX.student (where XX is the number of the student user assigned to you).

Steps:

Access and Respond to the Questionnaire as a Supplier

1. Sign in as the supplier contact for **Lee Supplies** (**ryan.lee** / weekly password).
2. On the **Supplier Portal** home page, click **Supplier Portal**, and then click the **Supplier Portal** icon in the **APPS** section.
3. In the global header, click the **Notifications** icon.
4. In the **Pending Notifications** dialog, you should see an invitation to respond to the initiative you created in the previous activity.
   Click the invitation link.
5. On the **You Are Invited to Respond** dialog box, click the **Respond to Questionnaire** link.
6. Select one of the response options to the question.
7. Click **Save**. Notice that after you save, the **Progress** bar graph shows **100 percent** complete. Because there was only a single question, your response completes the questionnaire.
8. Click **Submit**.
9. On the **Confirmation** dialog box, click **OK**.
10. Sign out of the application as **ryan.lee** and close the browser tab.
11. Optional: If you wish, you can sign in as **jade.gray** and reply to the invitation for **Staffing Services**.

View and Accept a Supplier Response

12. Sign back in with your student sign on / (weekly password).

13. From the **Navigato**r, under **Procurement**, select **Supplier Qualification**.
14. On the **Overview** page, click the **Tasks** tab, and click the **Manage Initiatives** task.
15. On the **Manage Initiatives** page, search for and open the initiative you created in a previous lesson.
16. On the **Initiative** page, from the **Actions** menu, click **Monitor**.
17. On the **Monitor Initiative** page, you can view information about the status of your initiative. The bar graphs show the progress of each step in processing your initiative.

    For example, the received responses graph shows you what percentage of the expected replies you have received so far. In this case, 50 percent of the replies are in because you entered a reply for one of the suppliers, Lee Supplies. If you also entered a reply from Staffing Solutions, you will have 100 percent. The number of expected responses includes replies from all of the suppliers invited as well as any internal responders you invited.
18. Highlight the row for the **Lee Supplies** response, and from the **Review and Accept** drop-down list select **Supplier Response**.
19. On the **Review Response** page, click the **Actions** menu and view the options: **View Questionnaire** and **Return to Responder**.

    While you are considering a supplier response, you can view the questionnaire if needed.

    If you need more information from the supplier, you can choose to send the response back to the supplier for additional details.

    For this practice, do not choose either value.
20. Click **Accept**
21. On the **Confirmation** dialog box, click **OK**.
22. On the **Monitor Initiative** page, notice that now the bar graph for the **Accepted Responses** graph is showing 50 percent since you have accepted one of the two expected responses.

Evaluate and Finalize a Supplier Response

Your next step is to evaluate the qualification. When you launched the initiative, a draft qualification was created for each of the suppliers invited.

23. Because you are processing the response from **Lee Supplies**, on the **Monitor Initiative** page there is an entry under the **Lee Suppliers: Qualifications** region.

    The row for **Lee Supplies** is already highlighted, so click **Evaluate Qualification**.
24. On the **Evaluate Qualification** page, assign an outcome for the response using the values below:

Qualification Outcome	Excellent
Qualification Start Date	Current Date
Qualification End Date	Dec 31 of current year
Expiration Reminder	30 Days
Evaluation Date	Current Date

25. Click **Finalize**
26. On the **Confirmation** dialog box, click **OK**.

27. When you are returned to the **Monitor Initiative** page, notice that the bar graphs for **Completed Qualifications** and **Completed Suppliers** are now also showing 50 percent. This is because you have finished evaluating the qualification for **Lee Supplies** so the processing for that supplier is complete.
28. Sign out of the application.

Practice Complete

You have successfully responded to a questionnaire, accepted, evaluated and finalized the response

Practice 14-3: Creating a Supplier Qualification Registration Rule Set

Instructor Note: The instructor should demonstrate this practice first, as demonstration number 14-3. Use the prc00.instructor user login instead of the prcXX.student user login.

Overview

In this activity you'll create a supplier qualification registration rule set and tie it to a Procurement business unit.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

Instructor user: To perform this practice, you must have successfully completed Demonstration 4-4: Defining Business Units.

Student user: To perform this practice, you must have successfully completed Practice 4-2: Creating a Business Unit.

User Login

prcXX.student (where XX is the number of the student user assigned to you)

Steps

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, select the **Supplier Qualification** functional area.
4. Click the **Manage Supplier Qualification Registration Rule Sets** task.
   Hint: To find the task you may need to set the **Show** field to **All Tasks**.
5. On the **Manage Rule Sets** page, in the **Search Results** section, click the **Create** icon.
6. On the **Create Rule Set** page, in **Rule Set** enter: `PRCXX Rule Set`, where XX is the number of our student user. For example, for student user prc15.student, enter PRC15 Rule Set.
7. Next to **Procurement BUs**, click the **Add** icon.
8. In the **Procurement BUs** dialog, select the name of the **Procurement BU** you created in an earlier lesson. For example, for the prc15.student user, select PRC15 Business Unit.
9. Click the right arrow button to move the BU to the Selected Procurement BUs list.
10. Click **OK**.
11. On the **Create Rule Set** page, in the **Description** field, enter: `Registration questionnaire for Hub Zone applicants`**.**
12. On the **Registration** tab, in the **Rules** section, click **Add Condition.**
13. In the **Add Condition** dialog box, set **Condition Type** to **Always displayed.**
14. Click **OK.**
15. On the **Create Rule Set** page, in the **Rules Section**, click **Add Qualification Areas**.
16. In the **Add Qualification Areas** dialog box, from the **Procurement BU** list select **US1 Business Unit**.
17. In the **Qualification Area** field, enter: `Compliance`.

18. Click **Search**.
19. Select the **Compliance** qualification area row.
20. Click **OK**.
21. On the **Create Rule Set** page, click **Add Condition**.
22. In the **Add Condition** dialog box, set:

Condition Type	Response Dependent
Supplier Attribute	Hub Zone (Business Classification)
Operator	Equals
Value	Yes

23. Click **OK**.
24. On the **Create Rule Set** page, click **Add Qualification Areas**.
25. In the **Add Qualification Areas** dialog box, from the **Procurement BU** list, select **US1 Business Unit**.
26. In the **Qualification Area** field, enter: `Hub Zone`.
27. Click **Search**.
28. Select the **Hub Zone** qualification area row.
29. Click **OK**.
30. Click the **Default Information** tab.
31. In the **Assignment Rules** section, in the Owner field, enter the name of your student user.

    Use the format `Student, PRCXX`, where XX is the number of your student user. For example, for user prc15.student, enter Student, PRC15.
32. Click **Activate**.
33. Click **Save and Close**.
34. On the **Confirmation** dialog box, click **OK**.

Practice Complete

You have successfully created a supplier qualification registration rule set.

Activities for Lesson 15: Setting Up and Managing Sourcing

Demonstration 15-1: Using Basic Functionality

Instructor Note: The instructor should perform the demonstration steps below, and then continue on with Practice 15-1: Using Basic Functionality. Use the prc00.instructor login instead of the prcXX.student login.

Overview

In this demonstration you will show the Negotiations landing page. Then you'll create a negotiation with requirements, lines and suppliers. You will then sign on as a supplier and respond to the negotiation. Finally, you will sign on again as the category manager, award the negotiation and create the purchase documents.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete demonstration 5-1: Managing Procurement Agents.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Show the Negotiations Landing Page

1. From the **Navigato**r, under **Procurement,** select **Negotiations**.
2. On the **Overview** page, describe some of the visible infolets:
    - **My Negotiations** – shows all the negotiations you are working on. They are grouped by lifecycle status. You can drill down for more information.
    - **Closing Next** – shows active negotiations that are scheduled to close next.
    - **Recent Activity** – shows what's happening with recent sourcing activities
3. Click the **Expanded View** icon in one or more infolets to demonstrate how information can be presented in an alternative fashion.
4. Click the **Front View** icon for each of the infolets changed in the previous step.
5. For one of the displayed infolets, click the **Action** dropdown icon and then click **Hide**. The infolet is no longer displayed.
6. Click the **My Infolets** icon and select the infolet that you hid in the previous step. Demonstrate that the infolet is now shown again.
7. Continue by demonstrating Practice 15-1: Using Basic Functionality.

Demonstration 15-2: Using Advanced Functionality

Instructor Note: The instructor should demonstrate Practice 15-2: Using Advanced Functionality. Use the prc00.instructor login instead of the prcXX.student login.

Demonstration 15-3: Two-Stage RFQ with Surrogate Response

Overview

In this demonstration you will create and process a two-stage RFQ. You will also show how to create a surrogate response for a supplier who does not have internet access.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete demonstration 5-1: Managing Procurement Agents.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Create a Two Stage RFQ Negotiation

1. From the **Navigato**r, under **Procurement,** select **Negotiations**.
2. On the **Overview** page, click the **Tasks** tab, then click **Create Negotiation**.
3. In the **Create Negotiation** dialog box, set:

Procurement BU	US1 Business Unit
Negotiation Type	RFQ
Negotiation Style	Two Stage Negotiation
Two Stage Evaluation	Select
Negotiation Template	`USTWO3300`
Outcome	Purchase Order
Negotiation Currency	USD

4. Click **Create**.
5. On the **Edit Negotiation (RFQ): Cover** page, click the **Overview** train stop.
6. On the **Edit Negotiation (RFQ): Overview** page, set:

Title	Your instructor prefix – Servers. For example, `00Servers`
Open Upon Approval	Select
Close Date	One month from today
Enable weights	Select

Display scoring criteria to suppliers	Deselect
Default Maximum Score	5
Price Tiers	Quantity Based
Rank Indicator	1,2,3…
Ranking Method	Multiattribute scoring
Restrict to invited suppliers and Display to Suppliers	Unchecked Unchecked
Allow suppliers to select lines on which to respond Display to Suppliers	Checked Checked
Require full quantity Display to Suppliers	Unchecked Unchecked
Allow multiple responses Display to Suppliers	Checked Checked

7. Click the **Requirements** train stop.
8. On the **Edit Negotiation (RFQ): Requirements** page, notice there are three evaluation stages that are already defined because of the template used when you created this negotiation.
   - **Server Specifications (Technical):** Most of the scoring is automatic and you will also apply the knockout scoring in this stage.
   - **Business (Commercial):** Most of the scoring is manual or the questions are informational and do not require scoring.
   - **Financial (Commercial):** Most of the scoring is manual or the questions are informational and do not require scoring.

   These stages will be visible to the buyer at different times, along with any surrogate response that is entered by the buyer.
9. Click the **Lines** train stop.
10. On the **Edit Negotiation (RFQ): Lines** page, verify the **Server** item is in the **Lines** section.
11. Click the **Suppliers** train stop.
12. On the **Edit Negotiation (RFQ): Suppliers** page, verify the listed suppliers:
    - Dell
    - EIP Inc.
    - Lee Supplies
    - Midtown Computer Supplies
    - Office Depot
    - RJK Inc
13. Click the **Review** train stop.
14. On the **Review Negotiation: RFQ** page, review all of the sections you just set up and verify the data is correct.

15. From the **Actions** menu select **Validate**. (Correct any errors. You can choose to address or ignore any warning messages.) After correcting any errors, validate again.
16. On the **Confirmation** dialog box, click **OK** to confirm a successful validation.
17. Click **Publish.** (If needed, you can click **Continue** on any warning dialog boxes.) Write down the RFQ number __________.
18. On the **Overview** page, click the **Refresh Page** icon, and look for your negotiation in the **My Negotiations** infolet.
19. Exit the application and close your browser.

Submit a Response from First Supplier

20. Reopen your browser and sign in to the application as ryan.lee/weekly password.
21. From the home page, click the **Supplier Portal** icon.
22. On the **Supplier Portal** page, in the **Recent Activity** infolet, you should have a notification that you have been invited to respond to the negotiation you just created as a buyer.

    Click the number link next to **Negotiation Invitations** in the infolet. If there is no number link, click the **Negotiation invitations** link.
23. On the **RFQ** page, click **Create Response.**
24. On the **Create Response (Quote): Overview** page, click the **Requirements** train stop.
25. On the **Create Response (Quote): Requirements** page, notice the **Section** drop-down list is set to **Section 1 Server Specifications**. Set:

Server Speed in GHz	`20`
Max Memory in Gb	`32`

26. From the **Section** drop-down list, select: **Section 2 Business.**
27. When the business requirements display, set:

What is your total number of employees?	`1500`
What is your website URL?	`www.leesupplies.com`
Date of Fiscal Year End.	June 30
Company Philosophy	`Always the best price and service`

    - Click the **Lines** train stop.
28. On the **Created Response (Quote): Lines** page, set:

Line Number	Item Description	Line Price	Response Quantity
1	Server V3349	2100	100

29. Click the **Edit Line Details** icon.
30. On the **Lines: Edit Line** page, in the **Cost Factors** section, in **Freight (per unit)** enter: `35`.
31. In the **Attributes** section, set:

What is daily production capacity of item	`500`

What is lead time (days) from order to shipment?	`5`
What is average % markup in price?	`120`

32. Notice you can enter some quantity-based price tiers if you choose. We will not do that for this activity.
33. Click **Save and Close**.
34. Click the **Review** train stop. Review all of the sections you just set up and verify the data is correct.
35. From the **Actions** menu, select **Validate**. Correct any errors.
36. On the **Confirmation** dialog box, click **OK**.
37. Click **Submit**. Write down the quote number __________.
38. On the **Confirmation** dialog box, click **OK**.
39. Sign out of the application and close your browser.

Submit a Response from Second Supplier

40. Reopen your browser and sign in to the application as john.kim/weekly password.
41. From the home page, click the **Supplier Portal** icon.
42. On the **Supplier Portal** page, in the **Recent Activity** infolet, you should have a notification that you have been invited to respond to the negotiation you just created as a buyer.

    Click the number link next to **Negotiation Invitations** in the infolet. If there is no number link, click the **Negotiation invitations** link.
43. On the **RFQ** page, click **Create Response.**
44. On the **Create Response (Quote): Overview** page, in **Note to buyer**, enter: `Always the lowest prices`**.**
45. Click the **Requirements** train stop.
46. On the **Create Response (Quote): Requirements** page, notice the **Section** drop-down list is set to **Section 1 Server Specifications**. Set:

Server Speed in GHz	`4`
Max Memory in Gb	`4`

47. In the **Section** drop-down list, select: **Section 2: Business**
48. Set:

What is your total number of employees?	`200`
What is your website URL?	`www.eip.com`
Date of Fiscal Year End.	Dec 31
Company Philosophy	`Always the best price and service`

49. Click the **Lines** train stop. Set:

Line Number	Item Description	Response Quantity
1	`Server V3349`	`100`

50. Click the **Edit Line Details** icon.
51. On the **Lines: Edit Lines** page, in the **Cost Factors** section, set:

Line Price	`1700`
Freight	`60`

52. In the **Attributes** section, set:

What is daily production capacity of item	`150`
What is lead time (days) from order to shipment?	`9`
What is average % markup in price?	`75`

53. Notice you can enter some quantity-based price tiers if you choose. We will not do that for this activity.
54. Click **Save and Close**.
55. Click the **Review** train stop. Review all of the sections you just set up and verify the data is correct.
56. From the **Actions** menu, select **Validate**. Correct any errors.
57. On the **Confirmation** dialog box, click **OK**.
58. Click **Submit**. Write down the quote number __________.
59. On the **Confirmation** dialog box, click **OK**.
60. Sign out of the application and close your browser.

Analyze Negotiation

61. Reopen your browser and sign in to the application as your instructor user.
62. From the **Navigato**r, under **Procurement,** click **Negotiations**.
63. On the **Overview** page, click the **Tasks** tab, then click **Manage Negotiations**.
64. On the **Manage Negotiations** page, use the negotiation number to search for the negotiation that you just created.
65. In the **Search Results**, click the negotiation number link.
66. On the **RFQ** page, from the **Actions** menu, select **Analyze > View Response History**.
67. On the **Response History** page, notice the **Response** column shows **Sealed**. Responses for both suppliers are sealed.

    Click **Done**.
68. To start seeing quote details, you must first close the negotiation and then unlock the **Technical** stage.
    On the **RFQ** page, from the **Actions** menu, select **Manage > Close**.
69. On the **Close Negotiation** dialog box, select **Close Immediately**.

70. In **Note to Supplier,** enter: `We must immediately close the RFQ. We will inform you shortly of our award decision`.
71. Click **Submit.**
72. On the **Confirmation** dialog box, click **OK**.

Unlock Technical Stage and Create Surrogate Technical Response

73. On the **RFQ** page, from the **Actions** menu, select **Manage > Unlock Stage: Technical**.
74. On the **Warning** dialog box, click **Yes**.
75. On the **RFQ** page, notice the **Status** shows: **Evaluation in Progress: Technical (Unlocked).**
76. Before you view the technical responses, you will enter a surrogate response for a supplier that does not have access to the supplier portal. This supplier sent a response using email communications.

    From the **Actions** menu, select **Manage > Create Surrogate Response: Technical**.
77. In the **Create Surrogate Response** dialog box, set:

Supplier	`Office Depot`
Supplier Contact	`Gasol, Jim`

78. Click **Create**.
79. On the **Create Response (Quote): Overview** page, in the **Response Received On** field, enter a date and time that is between the open and close date and time of the negotiation.
80. Click **Next**.
81. On the **Create Response (Quote): Requirements** page, notice only the **Technical** Evaluation Stage is displayed. Set:

Server Speed in GHz	`50`
Max Memory in Gb	`64`

82. Click **Next**.
83. On the **Create Response Quote: Lines** page, notice for the Lines, only the **Response Quantity** field is accessible. There is no field for **Price**. In the **Response Quantity** field, enter: `100`.
84. Click the **Enter Line Details** icon.
85. On the **Lines: Edit Line** page, notice the **Cost Factors** and **Quantity Based Price Tiers** sections are not visible since they are related to the item price.
86. In the **Attributes** section, set:

What is the daily production capacity of item?	`2000`
What is the lead time (days) from order to shipment?	`3`
What is average % markup in price?	`100`

87. Click **Save and Close.**
88. Click **Submit**.
89. On the **Confirmation** dialog box, click **OK**.

Unseal Technical Stage and Complete Technical Stage

90. Now it is time to evaluate the responses for the technical stage.
    On the **RFQ** page, from the **Actions** menu, select **Analyze > Analyze Negotiation**.
91. On the **Analyze Negotiation: RFQ** page, click the **Response** number link for **Lee Supplies**.
92. On the **Quote** page, notice as you view the **Overview**, **Requirements**, and **Lines** tabs which information is or is not visible during the **Technical Evaluation** stage.
93. On the **Requirements** tab:
    - Only requirements and supplier responses marked as Technical are visible.
    - The questions set for automatic scoring are also shown. You will enter the manual score later.
    - Requirements marked Commercial are not visible.
94. On the **Lines** tab:
    - The quote price is not visible. Price is part of the Commercial stage.
    - The line attributes are visible as well as supplier quote response. This can be used by the buyer to determine a manual score for a supplier in the requirements section.
    - Under **Attachments**, you should see an attachment only if the category is From Supplier: Technical. Commercial attachments are not visible.
95. Click **Done**.
96. On the **Analyze Negotiation: RFQ** page, click **Apply Knockout Criteria**.

The **Apply Knockout Criteria** dialog box opens to show that one supplier does not meet one of the requirements and is to be removed from shortlist.

97. Click **OK**.
98. On the **Analyze Negotiation: RFQ** page, notice one supplier is marked with a **Not Shortlisted** icon to indicate they have been removed from shortlist.
99. Click **Done**.

Note: During the Technical stage the supplier item price quote is not considered as the suppliers are reviewed based on just their technical merits and response. If a supplier does not meet the minimum criteria, they are knocked out, and the rest of their quote entries for the commercial stage are not considered.

You will not see the item price quote for the supplier EIP (even though it is the lowest of the 4 suppliers) because EIP was knocked out during the technical evaluation.

100. On the **RFQ** page, from the **Actions** menu, select **Manage > Unseal Stage: Technical**.
101. Click **Yes** on any **Warning** dialog boxes.
102. On the **Confirmation** dialog box, click **OK**.
103. You will now complete the technical stage of the evaluation. It is important to note that once this stage is completed, you cannot go back and update any of the technical scores or knockout results unless you choose the **Undo-Complete Evaluation** option from the **Actions** menu.

     From the **Actions** menu, select **Manage > Complete Stage: Technical**.

104. Notice the warning message. If you complete the Technical stage, responses excluded from the shortlist will not be available for evaluation in the Commercial stage. That means if a supplier was not short listed in the Technical stage, their response will not carry over to the Commercial stage.

     On the **Warning** dialog box, click **Yes**.

105. On the **Confirmation** dialog box, click **OK**.

Unlock Commercial Stage and Create Surrogate Commercial Response

106. On the **RFQ** page, from the **Actions** menu, select **Manage > Unlock Stage: Commercial**.
107. On the **Warning** dialog box, click **Yes.**
108. On the **Confirmation** dialog box, click **OK**.
109. At this point you will enter another surrogate response for the same supplier for whom you created the previous surrogate response. This time however, it will be for the commercial stage information.

     From the **Actions** menu, select **Manage > Create Surrogate Response: Commercial** .

110. On the **Create Surrogate Response** dialog box, set:

Supplier	`Office Depot`
Supplier Contact	`Gasol, Jim`

111. Click **Create**.
112. On the **Create Response (Quote): Overview** page, click **Next**.
113. On the **Create Response (Quote): Requirements** page, notice the Technical evaluation stage section is visible, but it is not editable.
114. From the **Section** list, select **Section 2: Business**.
115. Set:

What is your total number of employees?	`30000`
What is your website URL?	`www.dell.com`
Date of Fiscal Year End	`Dec 31`
Company Philosophy	`Hardware anywhere, anytime`

116. Click **Next**.
117. On the **Create Response (Quote): Lines** page, notice the **Line Price** field is now enabled. In the **Line Price** field, enter: `2350`.
118. Click the **Edit Line Details** icon.
119. On the **Lines: Edit Line** page, notice the **Cost Factors** and **Quantity Based Price Tiers** sections are now visible because they are related to the item price.

     In the **Cost Factors** section, in the **Freight (per unit**) field, enter: `25`.

120. Click **Save and Close**.
121. On the **Create Response (Quote): Lines** page, click **Submit**.

122. On the **Confirmation** dialog box, click **OK**.

Award the RFQ

123. On the **RFQ** page, from the **Actions** menu, select **Award > Award Negotiation**.
124. On the **Award Negotiation** page, from the **Actions** menu, select **View Automatic Award Recommendation**.
125. Click **Accept Recommendation.**
126. On the **Confirmation** dialog box, click **OK**.

Unseal Commercial Stage and Complete Commercial Stage

127. Click the **RFQ** tab.
128. On the **RFQ** page, from the **Actions** menu, select **Manage > Unseal Stage: Commercial**.
129. Click **Yes** on any **Warning** dialog boxes.
130. On the **Confirmation** dialog box, click **OK**.
131. Click the **Award Negotiation: RFQ** tab.
132. On the **Award Negotiation: RFQ** page, click **Submit for Approval**.
133. On the **Confirmation** dialog box, click **OK**.
134. Click the **Overview** tab.
135. On the **Overview** page, refresh the display until you see your negotiation has been approved in the **Recent Activity** infolet.

     This environment has been setup with the following approval rule:

     Award approval is required if the total award amount of the negotiation is equal to or over $50,000. If the amount is less than $50,000, the award is automatically approved.

     If the award amount for your negotiation is over $50,000, you will need to log in as tiffany.irving to approve the award via notification.
136. After your award negotiation is approved, click on the award notification to view the RFQ.
137. Click **Complete Award.**
138. You will receive a message, “You cannot make changes to award decisions after completing the negotiation.”

     Select the option **Create purchasing documents now,** and click **OK.**
139. On the **Confirmation** dialog box, click **OK**.
140. On the **Create Purchasing Document** page, click **Submit**
141. On the **Confirmation** dialog box, click **OK**.
     Note the purchase document number. __________.

     Note: The purchase order will have **Incomplete** status. Because you used “expense” items, there was no account number tied to the items. So you must update the purchase document to enter purchase order charge account numbers for each item before you can submit and approve the purchase order. You can use 101.10.60540.120.000.000.
142. Click **Done.** You return to the **Award Negotiation** page. Notice that the status is now **Completed, purchasing document created (Unsealed)**.

Demonstration Complete

You have successfully created and processed a two-stage RFQ.

Demonstration 15-4: Using Online Messaging

Overview

In this demonstration you will show how the online messaging feature can be used to communicate between the negotiation creator, other members of a collaboration team and a supplier.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete demonstration 5-1: Managing Procurement Agents.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Sign on as Category Manager and Create a Negotiation

1. From the **Navigator**, under **Procurement,** select **Negotiations**.
2. On the **Overview** page, click the **Tasks** tab and click **Create Negotiation**.
3. On the **Create Negotiation** dialog box, set:

Procurement BU	US1 Business Unit
Negotiation Type	Auction
Negotiation Style	Standard Negotiation
Outcome	Blanket Purchase Agreement
Negotiation Currency	USD

4. In the negotiation, set:

Cover Page train stop	No information needed	
Overview train stop	Title	Enter a title.
	Open upon approval	Selected
	Close Date	Select **Days after open date** and set to `30`

5. On the **Lines** train stop, add two lines. Set:

Description	Category	Estimated Quantity	UOM
`Printers`	Miscellaneous	`20`	Ea
`Servers`	Miscellaneous	`20`	Ea

6. On the **Suppliers** train stop, search for and add the following suppliers:

Supplier	Supplier Contact
Lee Supplies	ryan.lee
Advanced Corp	tom.gould

7. You want to send an online message to casey.brown (who is your manager and therefore is automatically defined to the collaboration team) asking about the collaboration team members for this negotiation.
   On the **Edit Negotiation (Auction): Suppliers** page, click **Messages**.
8. On the **Online Messages (Auction)** page, click the **Create** icon.
9. In the **Send Message** dialog, set:

To	Ryan, Christine
Subject	`Meg Chow`
Message	`Should I ask Meg as an evaluator?`

10. Click **Send** and then **Done**.
11. When you return to the **Edit Negotiation (Auction): Suppliers** page, click **Publish**.
12. On the **Confirmation** dialog box, click **OK** and sign out of the application.

Respond as First Supplier

13. Sign in to the application with ryan.lee (the contact for Lee Supplies).
14. Click the **Notifications** icon. On the **Notifications** dialog box, notice you have been invited to respond to the negotiation you created previously as the Category Manager.
15. Accept the negotiation invitation.
16. On the **Supplier Portal** page, in the **Recent Activity** infolet, open the negotiation invitation.
17. On the **Auction** page, click **Create Response**.
18. Click the **Lines** train stop.
19. On the **Create Response: Lines** page, notice there is no guidance as to what the opening bid should be.

    Create an online message that asks for a suggested starting bid. Note that you cannot specify a particular recipient for this message. It will go to the negotiation creator and all collaboration team members.
    Click **Messages**.
20. On the **Online Messages (Auction)** page, click the **Create** icon.
21. In the **Send Message** dialog, set:

Subject	`Starting Bid`
Message	`Is there a suggested opening bid for the Printers line?`

22. Click **Send,** and then and **Done**.
23. Sign out of the application.

Respond as Collaboration Team Member

24. Sign in as christine.ryan (your manager).
25. From the **Navigator**, under **Procurement**, click **Negotiations**.
26. On the **Overview** page, in the **Recent Activity** infolet, click the **New acknowledgment** item for the auction.
27. On the **Auction** page, click **Messages (2)**.
28. On the **Online Messages (Auction)** page, notice you have two messages:
    - One from your instructor sign-on (the negotiation creator).
    - Another from ryan.lee (the first supplier responder).
29. To respond to the message from the negotiation creator (your instructor sign-on), expand the folder for the message on Meg Chow.
30. Select the message row for the Meg Chow message. This shows the **Details** section, where you can read the message.
31. In the **Details** section, click **Reply.**
32. Enter your answer below the question: `Yes. Please include Meg`.
33. Click **Send.**
34. To respond to Ryan Lee, select the message row for the **Starting Bid** message.
35. In the **Details** section, click **Reply**.
36. Enter your response beneath the question: `Yes, an opening bid of $100 is good.`
37. Click **Send.**
38. On the **Online Messages** page**,** notice that both message rows now have a status of Replied**.**
39. Sign out of the application.

Sign on as Negotiation Creator and View Messages.

40. Sign in as your instructor user.
41. From the **Navigator**, under **Procurement**, click **Negotiations**.
42. On the **Overview** page, click the **Tasks** tab and click **Manage Negotiations**.
43. Search for and open the auction you drafted earlier in this demonstration.
44. On the Auction page, click **Messages (3)**.
45. On the **Online Messages: Auction** page, review the messages:
    - A response from Christine Ryan to your question about Meg Chow.
    - A response from Christine Ryan to Ryan Lee's question about an opening bid.
    - Ryan Lee's original question about an opening bid. (Note: since the supplier's question goes to everyone on the collaboration team, both you and Casey Brown received copies of the question.)
46. Select the message row for the reply from Christine Ryan to Ryan Lee, and click **Printable Page** to display messages formatted for printing.
47. Click **Done**.
48. Sign out of the application.

Demonstration Complete

You have successfully created a negotiation and sent and replied to messages from a collaboration member and a supplier.

Demonstration 15-5: Leveraging Questions from the Question Library and using Alternate Responses

Overview

In this demonstration you will use the delivered user Calvin Roth to show the key features of Oracle Sourcing Cloud using demonstration data in the classroom environment. You'll show the entire negotiation cycle from draft through award analysis. You'll also highlight the use of requirement types, question library, requirements questionnaire, alternate line and alternate response.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

calvin.roth

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Review the Negotiation Calendar

1. From the **Navigator,** under **Procurement,** select **Negotiations**.
2. On the **Overview** page, discuss the infolets that are displayed.
3. Click the **My Infolets** icon and discuss how the user can hide or show the available infolets.
4. Click the **Negotiation Calendar** tab.
5. The dynamic **Negotiation Calendar** portlet provides a schedule of upcoming negotiations for your user.

   In the **Negotiation Calendar** portlet, scroll the window as needed to hover the cursor over your active negotiation **RFQ 31757**, and wait for information box to appear.

   Additional information is displayed, such as negotiation title, status, open and close dates. In this case notice the negotiation is active.
6. Click the row for **RFQ 31757**. The **RFQ: 31757** page opens.

DEMO NOTE: As you review the draft negotiation, do not make any changes to it, and do not publish it. It must remain in the same state for repeatability and future demos.

7. In the **Table of Contents** for the negotiation, very briefly discuss how the negotiation consists of **Cover**, **Overview**, **Requirements**, **Lines**, **Contract Terms**, and **Suppliers** pages.
8. Click **Done**.

Review a Draft Negotiation

9. On the **Overview** page, click the **Tasks** tab and then click **Manage Negotiations**.
10. On the **Manage Negotiations** page, search for and open negotiation number **31756**.

Notice the RFQ is in **Draft** status.

11. On the **Review Negotiation: RFQ** page, click the **Overview** train stop.
12. The screen should default to display the **General** tab. If needed, click on **General** tab.
13. Scroll down screen to the **Requirements** section, and notice **Allow Alternate Lines** is set to **Yes**.

    The Alternate Line feature enables suppliers to propose alternates to the line item being sourced. Suppliers will have the flexibility to offer variety of alternative products that leverage their strengths. This will potentially drive down costs and increase savings for the buying organization. Buyers get an opportunity to evaluate newer, more advanced products to replace their existing outdated solutions. This fosters innovation in their business.
14. Scroll down to view the **Response Rules** section.

    Notice in the **Response Rules** section that **Allow Multiple Responses** is selected. This enables the Alternate Response feature.

    With the Alternate Response feature, a supplier can offer unique alternative proposals that leverage their strengths and potentially drive down costs for the buying organization. The supplier can submit multiple, alternative responses to a negotiation for evaluation. In an alternate response, the supplier contact can provide a completely separate set of responses for header level information, requirements, lines, and line details.

    The supplier contact can mark responses as primary or alternate, and use this mark for internal reference or for further communication with the category manager regarding their bid preference.

    A category manager can analyze and consider these responses for award.
15. Click the **Requirements** train stop.

    You have the ability to use questions from Supplier Qualification Management as requirements in a Sourcing negotiation. This draft negotiation has several examples of such questions.
16. Click on the line **Code of Conduct**, then click the **Edit** icon.

    This is an example where an attachment is tied to the question, and depending on the supplier response an attachment is required. Also, this question will automatically default in a supplier response if it has already been responded to by the supplier in a previous Supplier Qualification Management initiative or negotiation.
17. Click **Cancel.**
18. Click on the line **Public Company**, then click the **Edit** icon. This is an example of a branching question. Depending on supplier response, there may be additional questions that appear and require response.
19. Click **Cancel.**
20. Click on the line **Experience**, then click the **Edit** icon. This is an example of a question brought in from Supplier Qualification Management, then updated within Sourcing to add scoring information.
21. Click on the line **System Management**, then click the **Edit** icon. This is an example of a question that allows multiple selections.
22. Click **Cancel.**

    On the **Edit Negotiation: Requirements** page, notice four requirements are weighted and will be used for scoring the supplier responses. Two are based on supplier response, and two are internal questions that are scored by the buyer. You can create requirements in Sourcing or use questions from Supplier Qualification Management.

23. Click **Preview Requirement Questionnaire**.

    You can preview the requirement questionnaire to get an idea of what the supplier would see.
24. You can use the **Sections** drop-down list to navigate to the different sections.
25. Click **Done**.
26. You can use the requirements spreadsheet to create requirement structures offline. The spreadsheet supports the same actions that you can use online, such as adding sections, requirements, questions.

    On the **Edit Negotiation: Requirements** page, in the **Requirements** section, from the **Actions** menu, select **Add by Spreadsheet** > **Export Requirements**.
27. On the **Warning** dialog box, click **Yes**.
28. Click the file and open it. If asked, select the **Open with Microsoft Excel** option, then click **OK**. The Excel file opens with existing requirements shown.

DEMO NOTE: Do not import the requirements spreadsheet back to the negotiation. This demonstration is just to show what this spreadsheet file looks like.

29. Close the Excel requirements spreadsheet - do not save any changes.
30. On the **Edit Negotiation (RFQ): Requirements** page, click the **Lines** train stop.
31. Scroll down to the **Lines** section and notice **Allow Alternate Lines** is set to **Yes**.
32. Click the **Suppliers** train stop. This is where you add suppliers to the negotiation.

View the Negotiation PDF

33. On the **Edit Negotiation: Suppliers** page, from the **Actions** menu, select **View Buyer PDF**.
34. If the open PDF dialog box displays, select the **Open with Adobe Reader** option, and click **OK**. You may have to click the downloaded PDF file to open it, depending on the web browser.

    Viewing the PDF file for the RFQ is a useful function for both the buyer and supplier users.
35. Close the **Adobe Reader** window, and return to the **Edit Negotiation: Suppliers** page.

DEMO NOTE: Do not publish this seeded Negotiation 31756, the negotiation needs to be available for subsequent demos.

36. Click **Cancel** to close the draft negotiation.

Review an Active Negotiation

37. The next step is to review an active negotiation.

    If needed, click the **Overview** tab to return to the **Overview** page.
38. Click the **Tasks** tab, and then click **Manage Negotiations**.
39. On the **Manage Negotiations** page, search for and open the negotiation number **31757**, having the negotiation title **JSK10B - IT Equipment Upgrade**.
40. On the **RFQ** page, notice the negotiation is in **Active** status.
41. Click **Messages**.
42. On the **Online Messages (RFQ)** page, notice the table has two different messages for two different suppliers, regarding an alternate bid and an alternate item.

    Highlight the message lines to read the messages.

Also notice you can reply to the messages. We won't reply to the messages in this demonstration.

43. Click **Done.**
44. On the **RFQ** page, under the **Table of Contents**, click the **Requirements** link. Review the supplier responses to the questions.
45. Click the **Lines** tab.

    Notice there is a Line 1.
46. Click **Done.**

    DEMO NOTE: Do not close this seeded negotiation, so it remains available for subsequent demonstrations.
47. Sign out of the application and close the browser.

Submit a response (optional)

50. Reopen your browser and sign in using ryan.lee/weekly password.
51. From the home page, click the **Supplier Portal** icon.
52. On the **Supplier Portal** page, in the **Tasks** pane, click **View Active Negotiations**.
53. On the **Active Negotiations** page, in the **Negotiation** field, enter: `31757`.
54. From the **Response Submitted** list, select **Yes**.
55. Click **Search**.
56. Select the row for your negotiation number, then click **Create Response**.
57. In the **Create Response** dialog box, leave **Copy from an existing response** unselected, and click **Create**.
58. On the **Create Response (Quote): Overview** page, for **Response Type** field, select **Primary**.
59. Click **Next**.
60. On the **Create Response (Quote): Requirements** page, notice you can enter in values for the requirements questions. Notice how the list of response values for the questions show all possible values.
61. For **Section 1. Company**, use the following information to review or enter in the responses:

Question	Response
Do you agree…	Notice the response value is populated based on a previous response from the supplier in a supplier qualification management initiative. The supplier does not need to respond to the same question again. The response also includes the attachment that the supplier previously sent.
Is your business…	Notice the response value is populated based on a previous response from the supplier in a supplier qualification management initiative. The supplier does not need to respond to the same question again. The response also includes the attachment that the supplier previously sent.
How many years…	Select the response **d. 8 – 10 years**.

Describe your company…	Notice the response value is populated based on a previous response from the supplier in a supplier qualification management initiative. The supplier does not need to respond to the same question again. The response also includes the attachment that the supplier previously sent.

62. From the **Section** down-drop list select **Section 2. General Capabilities**.
63. For **Section 2. General Capabilities**, use the following information to review or enter in the responses:

Question	Response
Describe your company's…	Notice the response value is populated based on a previous response from the supplier in a supplier qualification management initiative. The supplier does not need to respond to the same question again.
Will you provide dedicated…	Select **Yes**.
2a.1) Is your support services…	Select **No**.
2a.2) Which of the following communications…	Select **a, b, c,** and **d**.
Which of the following systems…	Select **a** and **d**.
Do you have formal customer…	Notice the response value is populated based on a previous response from the supplier in a supplier qualification management initiative. The supplier does not need to respond to the same question again.

64. Click **Next.**
65. On the **Create Response (Quote): Lines** page, you enter a quote in the **Response Price** for each line. Based on the negotiation settings, the supplier can see the current **Best Response Price** if a response has already been submitted, to encourage a lower price entry.

    In the **Response Price** field, enter: 4,850.
66. In the **Create Alternate** column, click the **Create Alternate Line** icon.
67. On the **Lines: Edit Alternate Line** page, use the following information to respond with an alternate line:

Alternate Line Description	`BX100 Server`
Response Price	`4,150`

Note to Buyer	`This is our most basic model for the X series.`

68. Click **Save and Close.**
69. Click **Next.**
70. From the **Actions** menu, click **Validate**.
71. On the **Confirmation** dialog box, click **OK**.
72. Click **Submi**t.
73. On the **Confirmation** dialog box, click **OK**.
74. On the **Active Negotiations** page, click **Done**.
75. Sign out of the application and close the browser.

Analysis and Award

76. Sign in to the application as calvin.roth/weekly password.
77. From the **Navigator,** under **Procurement,** click **Negotiations**.
78. Click the **Tasks** tab, then click **Manage Negotiations**.
79. On the **Manage Negotiations** page, search for and highlight the row for the negotiation number **31758**, having the title **JSK10C - IT Equipment Upgrade**.

    Do not open the negotiation.
80. Click the **Monitor** icon for the negotiation.
81. On the **Monitor Negotiation: RFQ** page, notice the **Analytics** section includes a summary report and a graph. Notice each has a **Report** drop-down list from which you can choose the following options:
    - Negotiation Summary
    - Responses by Supplier
    - Savings by Supplier
    - Responses by Time

    Using these options, you can change the display of the summary report or graph independent of each other.
82. In the **Suppliers** section, notice there is a table listing the suppliers with links to their supplier response information.
83. From the **Actions** menu, select **Award > Award Negotiation**.
84. On the **Award Notification: RFQ** page, mention the advantages of having centralized award functionality, enhanced analytics, and efficient supplier and response comparison features.
85. In the **Award Summary** section mention the following:
    - In the **Award by Supplier** graph, notice how the award is split among the various suppliers.
    - In the **Award by Response** graph, notice all the suppliers relative to their response amount and score.
    - In the **Savings** graph, notice the graph provides a quick glance at the savings the award decision will yield.

      Explain that if the savings percent is less than the full possible savings, this may be due to certain suppliers not being shortlisted, or other scoring considerations.
86. Scroll down to the **Award** table. You can view the specific supplier response information.
87. Click **Done.**

DEMO NOTE: Do not make any changes to the award or save any changes. Do not submit the award for approval. Keep the award as it is, so it is available for subsequent demonstrations.

88. On the **Monitor Negotiation: RFQ** page, click **Done**.
89. Sign out of the application.

Demonstration Complete

You have successfully shown the entire negotiation cycle from draft through award analysis. You also highlighted the use of requirement types, question library, requirements questionnaire, alternate line and alternate response.

Demonstration 15-6: Using Sourcing and Projects Integration

Overview

In this demonstration you will show the integration between Oracle Sourcing Cloud and Oracle Project Management Cloud. You'll show an existing project and negotiation that has project tasks in various states based on delivered data in the classroom environment.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor
calvin.roth

Steps

Define Yourself as a Project Resource

Before you can create project objects, you must be defined as a project resource.

1. Sign in to the application as prc00.instructor / weekly password.
2. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
3. On the **Setup** page, select the **Project Execution Management** offering.
4. Select the **Project Execution** functional area.
5. From the **Show** list, select **All Tasks**.
6. Click the **Manage Project Enterprise Resources** task.
7. On the **Manage Project Enterprise Resources** page, click the **Create** icon in the **Search Results** section.
8. On the **Create Enterprise Project Resource** dialog box, select **Create from HCM Person**.
9. Enter your sign in user in the **HCM Person** field. For example, for sign in user prc00.instructor, enter prc00 into the field and then select PRC00 Instructor from the search list.
10. Select **Provision project roles.**
11. Click **Save and Close**.
12. Sign out of the application.

View a Project Plan

This demonstration uses predefined data that is delivered in the environment. For this reason, you'll perform the demonstration with a different user that can access the data.

13. Sign in to the application as **calvin.roth**.
14. From the **Navigator**, under **Projects**, click **Project Manager Dashboard**.

15. The **Project Manager Dashboard** provides you the relevant information that a project manager needs to manage projects and issues. You can configure the dashboard to see what is relevant to you by adding and removing portlets.

    Review the various portlets that give project managers an overview of projects, resources and members. For example:

    - **My Projects** shows a listing of your projects with various sort options and Project Resources helps you assess how to optimally distribute work among team members.
    - **My Issues** track issues related to your work so you can actively manage them.
16. From the **My Projects** portlet, click the **US1 IT Equipment Upgrade** link.
17. On the **Manage Project Plan** page, click the **US1 IT Equipment Upgrade** Task Name link.
18. On the **Edit Project Details** page, you can enter values relevant to the entire project such as **Start** and **Finish** dates.
19. The **Additional Information** section provides the flexibility for an organization to create administrator-defined fields as part of the project setup. The values can be stored with the project and reported in Oracle Transactional Business Intelligence.

    In this example, the fields are configured for a negotiation project.
20. Click **Cancel** to return to **Manage Project Plan** page.
21. From the **View** menu, select **Expand All**. This expands all the lines within the project. In this project, you can see a complete, end-to-end negotiation business process.

    You can create and edit tasks, associate negotiations, define dates, dependencies and constraints, associate deliverables and assign resources required to complete a defined set of work.

    As your negotiations progress, some tasks will be automatically updated and other tasks can be updated from the negotiation itself.
22. Hover the cursor slowly across the column headings (such as **Task Name**, **Work Items**, **Labor Resources**, and so on). Notice at various times the cursor changes into a select and drag tool, so you can widen or narrow the column width.
23. Continue to move the cursor in the page until a vertical separator line displays. This separator line marks the boundary of the timeline graph pane. You can click the separator line and drag it to widen or narrow the timeline graph pane. You can also use the Tab key to select the separator line and then use Ctrl+left arrow or Ctrl+right arrow to widen or narrow the timeline graph pane. As you make the timeline graph narrower, notice that other columns (**Start Date**, **Finish Date**, **Duration**, **Progress Status**, and **Percent Complete**) become visible.
24. On the toolbar, from the **View** menu, you can use the **Manage Columns** option to add columns to the project. You can also have administrator-defined columns called Task Codes to track and report information relevant to your organization.
25. If you do not see the **Work Items** and **Progress Status** columns, you can add them to the display.
    To do this click the **Actions** menu and select **Manage Columns**.
26. In the **Task Name** column, under the **Prepare Draft RFQ** task, you can see all the tasks to create a negotiation. You can associate a negotiation to the work item.
27. For the task **Define Collaboration Team,** notice the **Progress Status** is **Complete**, and the **Percent Complete** is **100**.
28. For tasks where you see a value under the **Work Item** column, this means that project task has been tied to a negotiation.

Associate a Negotiation to a Project Task

29. In the **Task Name** column, select the **Approve Award** task.
30. Click the **Manage Work Items** icon under the **Work Items** column.
31. In the **Manage Work Items: Approve Award** dialog box, enter the following information:

Type	`Negotiation`
Name	`P24 IT Equipment Upgrade`
Current Status	`Draft`
Task Completion Event	`Award Approved`

32. Click **Cancel** so this overview demonstration can be shown again. Do *not* click the **Save and Close** button.

    For certain negotiation-related tasks, the system automatically updates the project as the task completes. In this example, when the sourcing award is approved, the system will automatically complete the task. As these types of negotiation activities occur, the system will keep the project synchronized, making it much easier to track and manage the project.
33. On the **Manage Project Plan** page, for the task **Define Requirements**, click the **Manage Work Items** icon under the **Work Items** column.
34. In the **Manage Work Items** dialog box, notice that the **Type** field is set to **Negotiation**. This ties the task to a negotiation.
35. Click the **Open Work Item** icon.
36. This opens a new browser tab that displays information on negotiation **RFQ 31755 (P24 IT Equipment Upgrade)**. Notice the RFQ is in Draft status.
37. Click the **Overview** train stop.
38. Click the **Project Tasks** tab.
39. Notice this RFQ already has multiple tasks associated to the project tasks. This is also where you user can associate additional tasks from the project to the negotiation.

    From the negotiation, you can easily view and complete many of the tasks related to the negotiation.

    In the example used for this demonstration, the project was created first, but you can also create the project and tasks from the negotiation as well.

Tying a Project Task to a Negotiation

40. Click **Associate Project Task.**
41. In the **Associate Project Task** dialog box, enter the following information:

Project	`US1 IT Equipment Upgrade`
Task	`Approve Award`
Task Completion Event	`Award Approved`

42. Click **Cancel** so this demonstration can be repeated. Do not click the **OK** button.
43. Click the line for the task **Define Collaboration Team**.

44. Notice the button for **Complete Task** is unavailable for use. This is because the task is already 100 percent complete.
45. Click the line for the task **Define Requirements**. Notice the button for **Complete Task** is available for use.
46. Under the **Project** column, click the **US1 IT Equipment Upgrade** link to go back to the project.
47. On the **Manage Project Plan** page, expand the table so all columns are visible.
48. From the **View** menu, select **Expand All**. This expands all the lines within the project.
49. Discuss again that some tasks in the project are in **Complete** status, while others are **In Progress** or **Not started**.
50. Highlight the first line of the table, and in the toolbar click the **Social** icon. The **Oracle Social Network** pane opens.

    Discuss how you can use **Oracle Social Network** to enhance communications between project team members.
51. Close the **Oracle Social Network** pane.
52. Sign out of the application and close the extra browser tabs that were opened.

Demonstration Complete

You have shown an existing integration between a project in Oracle Project Management Cloud and a negotiation in Oracle Sourcing Cloud.

Demonstration 15-7: Implementing Sourcing

In this demonstration you will show some of the setup tasks needed to implement Oracle Sourcing Cloud; such as negotiation templates, negotiation styles, negotiation lookups, cost factors, and cost factor lists.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Create a Negotiation Template

In this section, you will create a negotiation template.

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup** page, select the **Procurement** offering.
3. On the **Setup: Procurement** page, select the **Sourcing** functional area.
4. From the **Show** list, select **All Tasks**.
5. Click the **Manage Negotiation Templates** task.
6. On the **Manage Negotiation Templates** page, click the **Create** icon.
7. On the **Create Negotiation Template** dialog box, enter the following information.
   Accept defaults wherever they appear. Point out along the way the pieces of information which are not entered into the template (such as Close Date).

Procurement BU	Negotiation Type
US1 Business Unit	RFQ

8. Click **Create**.
9. On the **Edit Negotiation Template** page, click the **Overview** train stop.
10. On the **Edit Negotiation Template (RFQ): Overview** page, name your template **PRC00 Class Template**.
11. Click the **Lines** train stop.
12. On the **Edit Negotiation Template (RFQ): Lines** page, add four negotiation lines:

Description	Category	UOM
Printers	Computer Supplies	Each
External Monitors	Computer Supplies	Each

Servers	Computer Supplies	Each
Laptops	Computer Supplies	Each

13. Click the **Suppliers** train stop.
14. On the **Edit Negotiation Template (RFQ): Suppliers** page, add three suppliers:

Supplier	Supplier Contact
Lee Supplies	ryan.lee
Staffing Services	jade.gray
Howell Engineering	jose.perez

15. Click the **Review** train stop.
16. On the **Review Negotiation Template (RFQ)** page, from the **Actions** menu, click **Validate**.
17. On the **Confirmation** dialog box, click **OK**.
18. Click **Activate**.
19. On the **Confirmation** dialog box, click **OK**.
20. When you return to the **Edit Negotiation Template** page, add a supplier site for **Lee Supplies**.
21. Click **Activate**.
22. On the **Confirmation** dialog box, click **OK**.
23. On the **Manage Negotiation Templates** page, click **Done**.

Create a Negotiation Style

In this section, you will create a negotiation style that can be used with two-stage RFQ negotiations.

24. On the **Setup: Procurement** page, in the **Search Tasks** field, enter: **manage negotiation styles**. Then click the **Search** icon.
25. In the search results, click **Manage Negotiation Styles**.
26. On the **Manage Negotiation Styles** page, click the **Create** icon.
27. On the **Create Negotiation Style** page, name your style **PRC00 Two-Stage Style.**
28. Give your style a code of **PRC00twostage**.
29. Set:

Document Types	Auction - Enable	Deselected
	RFI - Enable	Deselected
	RFQ - Enable	Selected
	RFQ - Negotiation Display Name	`Two-Stage RFQ`
Controls – Cover Page	Cover page	Deselected
Controls - Overview	Terms instructions	Deselected
Controls - Requirements	Instructions	Deselected

Controls - Lines	Instructions	Deselected
	Lots	Deselected
	Line groups	Deselected
Controls – Contract Terms	Contract terms	Deselected

30. Click **Save and Close**
31. On the **Confirmation** dialog box, click **OK**.
32. Click **Done**.

Define Negotiation Lookups

In this section, you will create a requirement section name and an attribute group name.

33. On the **Setup: Procurement** page, click the **Manage Sourcing Lookups** task.
34. On the **Manage Sourcing Lookups** page, click the link for **PON_HEADER_ATTRIBUTES_GROUPS**.
35. In the **PON_HEADER_ATTRIBUTE_GROUPS: Lookup Codes** section, the table contains the lookup attributes for the requirement section names.
36. Click the **Add** icon.
37. Enter the following:

Lookup Code	Display Sequence	Start Date	Meaning	Description
`00Requirement Lookup for Class`	`50`	Select today's date.	`00 Requirement Lookup for Class`	`Requirement lookup for PRC implementation course`

38. Click **Save and Close.**
39. On the **Manage Sourcing Lookups** page, click the **PON_LINE_ATTRIBUTE_GROUPS** link.
40. In the **PON_LINE_ATTRIBUTE_GROUPS** section, the table contains the defined attribute group names.
41. Click the **Add** icon.
42. Enter the following:

Code	Display Sequence	Start Date	Meaning	Description
`00Attribute Lookup for Class`	`50`	Select today's date.	`00 Attribute Group Lookup for Class`	`Attribute Lookup for PRC implementation course`

43. Click **Save and Close**.

44. Click **Done**.

Create Cost Factors

In this section, you will create three cost factors.

45. On the **Setup: Procurement** page, click **Manage Cost Factors**.
46. On the **Manage Cost Factors** page, click the **Create** icon.
47. Create the following three cost factors using the indicated codes and pricing basis:

Name	Code	Pricing Basis
00Shipping	00Ship	Fixed amount
00Hazardous materials charge	00Hazard	Fixed amount per unit
00Import tax	00Import	Percentage of line price

48. Click **Save and Close**.
49. On the **Confirmation** dialog box, click **OK**.

Define Cost Factor Lists

In this section, you will show how to create a cost factor list.

50. On the **Setup: Procurement** page, click **Manage Cost Factor Lists.**
51. On the **Manage Cost Factor Lists** page, click the **Create** icon.
52. On the **Create Cost Factor List** page, create a cost factor list called **`00Shipping Costs`**.
53. To this list, add the three cost factors you created in the previous demonstration.
    Click the **Create** icon and then search for the cost factors by name to add to your list.
54. Click **Save and Close**.
55. On the **Confirmation** dialog box, click **OK**.
56. Click **Done**.
57. Sign out of the application.

Demonstration Complete

You have successfully shown some of the setup tasks needed to implement Oracle Sourcing Cloud; such as negotiation templates, negotiation styles, negotiation lookups, cost factors, and cost factor lists.

Practice 15-1: Using Basic Functionality

Instructor Note: The instructor should demonstrate this practice first, as demonstration number 15-1. The instructor should use the prc00.instructor user login instead of the prcXX.student user login.

Overview

In this practice, you will create a negotiation with requirements, lines and suppliers. You will then sign in as a supplier and respond to the negotiation. Finally, you will sign in again as the category manager, award the negotiation and create the purchase documents.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete Practice 5-1: Managing Procurement Agents.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

Create a Negotiation

1. From the **Navigator**, under **Procurement**, select **Negotiations**.
2. On the **Overview** page, click the **Tasks** tab, then click **Create Negotiation**.
3. On the **Create Negotiation** dialog box, set:

Procurement BU	US1 Business Unit
Negotiation Type	Auction
Negotiation Style	Standard Negotiation
Outcome	Blanket Purchase Agreement
Negotiation Currency	USD

4. Click **Create**.
5. On the **Edit Negotiation (Auction): Cover** page, click the **Overview** train stop.
6. In the **Title** field, enter: `PRCXX Class Auction`, where XX is the number of your student user. For example, PRC25 Class Auction.
7. On the **Edit Negotiation (Auction): Overview** page, in the **General** tab, set:

Close Date (in the Schedule section)	Select Fixed and choose the last day of the month.

Default Maximum Score (in the Requirements section)	10
Restrict to invited suppliers (in the Response Rules section)	Selected

8. Click the **Terms** tab.
9. In the **Currency** section, deselect **Allow responses in other currencies**.
10. Click the **Requirements** train stop.
11. On the **Edit Negotiation (Auction): Requirements** page, in the **Requirements** section, from the **Actions** menu, select **Add Predefined Section**.
12. Select **General** as the **Requirement** name.
13. From the **Actions** menu, select **Add Requirement**.
14. On the **Requirement: Add Requirement** page, you will enter values to create two requirements to solicit general information from the supplier. Set:

Requirement	`Years in Business`
Requirement Text	`How many years have you been in business?`
Requirement Type	Text entry box
Scoring	Manual

15. You will accept all the other defaults, so click **Save and Close**.
16. On the **Edit Negotiation: Requirements** page, in the **Requirements** section, highlight the **General** row and click **Add Requirement**.
17. Set:

Requirement	`Corporate Structure`
Requirement Text	`What is your corporate structure?`
Requirement Type	Multiple choice with single selection
Scoring	Automatic

18. In the **Acceptable Values** section, click **Add Acceptable Value** and create two possible answers:

Acceptable Value	Score
Public	60
Private	40

19. Click **Save and Close.**

20. When you are returned to the **Edit Negotiation: Requirements** page, set the weights for the requirements by entering values in each row in the **Weight** column:

How many years have you been in business?	60
What is your corporate structure?	40

21. Click **Save**.
22. Click **Next.**
23. On the **Edit Negotiation: Lines** page, in the **Lines** section, click the **Add** icon to add the following lines to the auction. If there is no value specified here, accept the default.

Description	Category	Estimated Quantity	Estimated Quantity
Printers	Computer Supplies	50	Ea
Servers	Computer Supplies	5	Ea

24. Click **Save**.
25. Click the **Suppliers** train stop.
26. On the **Edit Negotiation: Suppliers** page, in the **Suppliers** section, click **Search and Add**.
27. On the **Suppliers: Add Suppliers** page, in the **Supplier Keywords** field, enter: `Lee`.
    Then click **Search**.
28. In the **Search Results**, select the row for **Lee Supplies** and click **Add to Selection**.
29. Notice that **Lee Supplies** now displays in the **Supplier Selection** pane.

    Click **Continue** to return to the **Edit Negotiation: Suppliers** page.
30. Click **Search and Add** and repeat the previous steps to search for and add `Advanced Corp`.
31. **Advanced Corp** should now be displayed in the list in the **Supplier Selection** pane.
32. You have added the two suppliers to your negotiation, so in the **Supplier Selection** pane, click **Continue**.
33. On the **Edit Negotiation: Suppliers** page, in the **Supplier Site** and **Supplier Contact** columns, enter sites and contacts for your two suppliers.

Supplier	Supplier Site	Supplier Contact
Lee Supplies	Lee US1	Lee, Ryan
Advanced Corp.	AC US1	Gould, Tom

34. Click **Save.**
35. Click **Next**.
36. On the **Review Negotiation: Auction** page, in the **Table of Contents**, use the links to navigate between sections of your negotiation. Check that you entered the requirements and lines information according to the instructions.
37. Notice that from the **Actions** menu, you can download and view PDF versions of the supplier and buyer documents.
38. To check your negotiation, from the **Actions** menu, select **Validate**.

    If your negotiation has errors, use the page links under the **Table of Contents** to go to the appropriate page and correct the errors.

If you negotiation validates successfully, on the **Confirmation** dialog box, click **OK**.

Write down the number of your auction ___________.

39. On the **Review Negotiation: Auction** page, click **Publish**.

    If approvals are enabled in your environment, the negotiation is automatically submitted for approval.

40. You are returned to the **Overview** page. Click **Refresh** until you see your negotiation appear in the **My Negotiations** infolet with a status of **Active**. At this point your negotiation is open and ready to accept responses.

    Alternatively, you can click the **Tasks** tab and then click **Manage Negotiations**. Then use the **Manage Negotiations** page to search for your negotiation number and view its status.

41. Sign out of the application and close your browser.

Respond as the First Supplier

42. Reopen your browser and sign in to the application as ryan.lee/weekly password. (Ryan Lee is the contact for Lee Supplies).
43. On the home page, locate and click the **Supplier Portal** icon.
44. On the **Supplier Portal** page, in the **Recent Activity** infolet, you should have a notification that you have been invited to respond to the negotiation you just created as a buyer.
45. From the **Tasks** list, click **View Active Negotiations**.
46. On the **Active Negotiations** page, select the row for the negotiation, and click **Create Response.**
47. On the **Create Response: Overview** page, click the **Requirements** train stop.
48. On the **Create Response: Requirements** page, answer:

How many years have you been in business?	6
What is your corporate structure?	Private

49. Click the **Lines** train stop.
50. On the **Create Response: Lines** page, enter a value in the **Response Price** column for each line.

Printers	100
Servers	200

51. Click **Next**.
52. On the **Review Response** page, you can use the tabs to view the information you have entered for your response.
53. From the **Actions** menu, select **Validate** to check your entries.
54. On the **Confirmation** dialog box, click **OK**.

55. When you are satisfied with your response, click **Submit.**
56. On the **Confirmation** dialog box, click **OK**.
57. Sign out of the application and close your browser.

Respond as the Second Supplier

58. Reopen your browser and sign in to the application as tom.gould. (Tom Gould is the contact for Advanced Corp).
59. On the home page, click the **Supplier Portal** icon.
60. On the **Supplier Portal** page, in the **Recent Activity** infolet, you should have a notification that you have been invited to respond to the negotiation you just created as a buyer.
61. From the **Tasks** list, click **View Active Negotiations**.
62. On the **Active Negotiations** page, select the row for the negotiation, and click **Create Response.**
63. On the **Create Response: Overview** page, click the **Requirements** train stop.
64. On the **Create Response: Requirements** page, answer:

How many years have you been in business?	8
What is your corporate structure?	Private

65. Click the **Lines** train stop.
66. On the **Create Response: Lines** page, enter a value in the **Response Price** column for each line.

Printers	90
Servers	190

67. Click **Next**.
68. On the **Review Response** page, you can use the tabs to view the information you have entered for your response.
69. From the **Actions** menu, select **Validate** to check your entries.
70. On the **Confirmation** dialog box, click **OK**.
71. When you are satisfied with your response, click **Submit.**
72. On the **Confirmation** dialog box, click **OK**.
73. Sign out of the application and close your browser.

Award the Negotiation and Create the Purchasing Document

74. Reopen your browser and sign in to the application as prcXX.student, where XX is the number of your student user.
75. From the **Navigator**, under **Procuremen**t, click **Negotiations**.
76. On the **Overview** page, in the **Recent Activity** infolet, notice you have new responses. Click the **New Responses** link.
77. On the **Response History** page, you can view both responses. Notice the following:
    - If you wish to see details about a response, you can click the response number link.

- If a response is unacceptable, you can select that response and, from the **Actions** menu, click **Disqualify**.

78. After viewing both the responses, you are ready to award the negotiation. Click the **Tasks** tab, then click **Manage Negotiations**.
79. On the **Manage Negotiations** page, search for your negotiation using the negotiation number.
80. In the **Search Results**, find and open the negotiation.
81. On the **Auction** page, from the **Actions** menu, select the **Manage > Close**.
82. On the **Close Negotiation** dialog box, enter a note to the suppliers: **Negotiation is closed**.
83. Click **Submit**.
84. On the **Confirmation** dialog box, click **OK**.
85. On the **Auction** page, notice the negotiation status is now **Closed**.
86. From the **Actions** menu, select **Award > Award Negotiation**.
87. On the **Award Negotiation** page, select the **Lines** tab.
88. Select the first line, **Printers**. Click **Award**.
89. On the **Award Line** page, there are graphs that you can use as you consider your award decisions.

    In the **Compare and Award** lines section, the responses are displayed side by side so you can easily compare them. Notice the following things about the display:

    - The responses appear side by side with the best response first. You can see the rank of the responses in the **Rank** row. The rankings are based on the bid prices offered.
    - You can see each bid's response to the negotiation requirements. Click the **Requirement Score** link to view the requirement responses.
90. After you have reviewed the bid information, award the line to the bid with the lowest price.

    On the **Award Decision** row, select the award check box in the column for the winning supplier.

    Notice that as soon as you select the award check box for a supplier, the graphs in the top of the page are updated to reflect the new award status for the negotiation.
91. Click **Save and Close**.
92. On the **Confirmation** dialog box, click **OK**.
93. On the **Award Negotiation** page, select the second line, Servers.
94. Click **Award**.
95. On the **Award Line** page, award all the server units to the supplier with the lowest price.
96. Click **Save and Close**.
97. On the **Confirmation** dialog box, click **OK**.
98. On the **Award Negotiation** page, click **Submit for Approval**.
99. On the **Confirmation** dialog box, click **OK**.

    Notice that you must explicitly submit the award decision for approval. (When you created the negotiation, it was automatically submitted for approval when you published it.)
100. Click the **Overview** tab to open the **Overview** page.
101. Click the **Refresh Page** icon to refresh the display until you see the negotiation in the **Recent Activity** infolet with a value of **Award approved**.
102. In the **Recent Activity** infolet, click the **Award approved** link.
103. On the **Award Negotiation (Auction)** page, click **Complete Award**.

104. On the **Complete Award** dialog box, you will select your next action. Note that once you complete a negotiation, you cannot change the award decisions.
For the **Outcome**, select **Create purchase documents now**.
105. Click **OK**.
106. On the **Confirmation** dialog box, click **OK**.
107. On the **Create Purchasing Documents** page, you can view the information that will be used to create the purchasing documents. You can view each supplier's purchasing document by selecting that supplier's row in the **Awarded Lines** region.
108. Click **Submit.**
109. On the **Confirmation** dialog box, click **OK**.
110. If you wish to view the purchasing document for a particular supplier, click the **Purchasing Document** link. You can also download and view a PDF of the purchasing document.
111. Sign out of the application.

Practice Complete

You have successfully created a negotiation with requirements, lines and suppliers. You have also signed in as two suppliers and responded to the negotiation. Finally, you awarded the negotiation and created the purchase documents.

Practice 15-2: Using Advanced Functionality

Instructor Note: The instructor should demonstrate this practice first, as demonstration number 15-2. Use the prc00.instructor user login instead of the prcXX.student user login.

Overview

For this scenario, you are renegotiating a contract for computer components. To create your negotiation, you will create a negotiation template based on the negotiation you created in the previous activity. After the negotiation is published, you will create an amendment to increase a line quantity, respond to the amendment as a supplier, and complete the award decision.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To complete this practice successfully, you must first complete practices 5-1: Managing Procurement Agents, and 15-1: Using Basic Functionality.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps:

Create a Template from a Negotiation

1. From the **Navigator**, under **Procuremen**t, select **Negotiations**.
2. On the **Overview** page, click the **Tasks** tab, then click **Manage Negotiations**.
3. On the **Manage Negotiations** page, in **Negotiation**, enter the number of the negotiation you created in the previous practice 15-1: Using Basic Functionality.
4. In the **Search Results**, click the **Negotiation** number link for your negotiation.
5. On the **Auction** page, from the **Actions** menu, select **Duplicate** > **Copy to Negotiation Template**.
6. On the **Edit Negotiation Template: Cover** page, click the **Overview** train stop.
7. On the **Edit Negotiation Template: Overview** page, enter a title for your template: **PRCXX Computer Components Template**, where XX is the number of your student user. For example, for the prc25.student user, enter PRC25 Computer Components Template.
8. Click **Save**.
9. Click the **Activate** button.
10. On the **Confirmation** dialog box, click **OK**.

Create a Negotiation from the Template

11. On the **Auction** page, click the **Tasks** tab, then click **Create Negotiation**.

12. On the **Create Negotiation** dialog box, verify or enter the following:

Procurement BU	US1 Business Unit
Negotiation Type	Auction
Negotiation Style	Standard Negotiation (Not Simple Negotiation.)
Negotiation Template	Your template name. For example, `PRCXX  Computer Components Template`
Outcome	Blanket Purchase Agreement

13. Click **Create**.
14. On the **Edit Negotiation: Cover** page, click the **Overview** train stop.
15. On the **Edit Negotiation: Overview** page, verify or enter the following:

Title	`PRCXX Auction Part 2`, where XX is the number of your student user
Open upon approval	Selected
Close Date	Fixed Set the date to the last day of the month.

16. Click the **Requirements** train stop.
17. On the **Edit Negotiation: Requirements** page, verify that the information duplicated from the previous auction is correct.
18. Click the **Lines** train stop.
19. On the **Edit Negotiation: Lines** page, verify that the **Printers** and **Servers** lines are correctly copied from the negotiation template.
20. In the Lines section, click the **Add Line** icon to add another line.
21. Enter the following information:

Description	Category	Estimated Quantity	UOM	Current Price	Start Price
`Laptop`	`Computer Supplies`	`50`	Each	`650`	`500`

22. Select the new line and click the **Edit** icon.
23. On the **Lines: Edit Line** page, in the **Cost Factors** section, from the **Actions** menu select **Add Row**.

    Note that you could have also clicked the **Add** icon to add the row.

23. Set:

Cost Factor	`Freight`
Pricing Basis	Per Unit
Target Value	`2.0`
Display Target	Selected

24. In the **Attributes** section, click the **Add Predefined Group** button.
25. From the **Attribute** list, select **Exterior**.
26. Click the **Add Attribute** button.

    On the **Add Attribute** page, in the **Attribute** text entry box, enter: `What Color?`
    Format the text so that it is bold and underlined.

27. Set:

Response	Required
Value Type	Text
Target	`Black`
Display target	Selected

28. At the top of the page, from the **Save and Close** button drop-down**,** select **Save and Add Another**.
29. On the **Add Attribute** page, set:

Attribute text box	`Size?`
Response	Required
Value Type	Text
Target	`Large`
Display target	Selected

30. Click **Save and Close** to close the **Add Attribute** page.
31. On the **Lines: Edit Line** page, click **Save and Close**.
32. On the **Edit Negotiation: Lines** page, click the **Suppliers** train stop.
33. On the **Edit Negotiation: Suppliers** page, verify the supplier information that was copied from the template.

Supplier	Supplier Site	Supplier Contact
Advanced Corp	AC US1	Gould, Tom
Lee Supplies	Lee US1	Lee, Ryan

Publish and Submit for Approval

34. Click the **Review** train stop.
35. Review all of the sections you just set up and verify the data is correct.
36. From the **Actions** menu, click **Validate**.
37. On the **Confirmation** dialog box, click **OK**.
38. Write down the negotiation number ___________.
39. Click **Publish,** and on the **Confirmation** dialog box, click **OK**. If there are warnings, click **Continue**.

    Note: Publishing the negotiation automatically submits it for approval, if approvals are enabled in your system.
40. Click the **Overview** tab.
41. On the **Overview** page, click the **Tasks** tab, then click **Manage Negotiations**.
42. On the **Manage Negotiations** page, search for your negotiation.
43. In the **Search Results**, in the row for your negotiation, notice the **Status** is **Active**.

    This means the negotiation has been approved and is opened for supplier responses.

Create an amendment

After the negotiation is published, your manager informs you that 100 laptops are needed instead of only 50, so in this section you create an amendment to the published negotiation.

44. On the **Manage Negotiations** page, in the **Search Results**, in the row for your negotiation, click the negotiation number link to open the negotiation.
45. On the **Auction** page, from the **Actions** menu, click **Manage > Create Amendment**.
46. On the **Edit Negotiation: Cover** page, click the **Overview** train stop.
47. On the **Edit Negotiation: Overview** page, in **Amendment Description**, enter: `Increasing Laptop quantity`**.**
48. Click the **Lines** train stop.
49. On the **Edit Negotiation: Lines** page, in the **Laptops** line, change **Estimate Qty** from **50** to **100**.
50. Click **Publish.**
51. When the confirmation dialog displays, write down the **Negotiation** number __________.

    Notice how the original negotiation number was incremented.
52. On the **Confirmation** dialog box, click **OK**.
53. Sign out of the application and close the browser.

Respond as a Supplier Online

54. Sign in to the application as ryan.lee (Ryan Lee is the supplier contact for Lee Supplies).
55. From the home page, click the **Supplier Portal** icon.
56. On the **Supplier Portal** page, click the **Notifications** icon.
57. On the **Notifications** dialog box, notice you have a notification that you have been invited to respond to the negotiation amendment you just created as a buyer.
58. Click the notification link to view the notification.
59. On the **Amendment 1 for Negotiation** dialog box, review the text and then, in the **Related Links** section, click the **Acknowledge Amendments** link.
60. On the **Acknowledge Amendments** page, view the details of the amendment.
61. Select the **Acknowledgment** check box to indicate that you accept the amendment.
62. Click **Submit**, then, on the **Confirmation** dialog box, click **OK**.
63. On the **Active Negotiations** page, select the row for your negotiation and click **Create Response**,
64. On the **Create Response: Overview** page, click the **Requirements** train stop.
65. On the **Create Response: Requirements** page, reply to the requirements.
66. Click on the **Lines** train stop.
67. On the **Create Response: Lines** page, enter the following response prices for each corresponding line item:

Line Number	Item Description	Line Price
1	Printers	`75`
2	Servers	`300`
3	Laptop	`725`

68. Click outside the **Line Price** field. You receive an error message because the line price you entered is greater than the Start Price. To correct the error, enter a **Line Price** value that is lower than the **Start Price**.
69. Click the **Required Details** icon for the laptop line.

70. On the **Lines: Edit Lines** page, in the **Cost Factors** section, in the **Response Value** field for the **Freight** row, enter `0.30`.
71. In the **Attributes** section, set:

What color?	`Silver`
Size	`Medium`

72. Click **Save and Close.**
73. On the **Create Response: Lines** page, click the **Review** train stop.
74. Review all of the sections you just set up and verify the data is correct.
75. From the **Actions** menu, select **Validate**.
76. Click **Submit**.
77. When the **Confirmation** dialog box displays, write down the response number ___________. Then click **OK**.
78. Sign out of the application and close the browser.

Respond as a Supplier by Spreadsheet

79. Reopen your browser and sign in to the application as tom.gould (Tom Gould is the supplier contact for Advanced Corp).
80. From the home page, click the **Supplier Portal** icon.
81. On the **Supplier Portal** page, click the **Notifications** icon.
82. On the **Pending Notifications** dialog box, notice you have a notification that you have been invited to respond to the negotiation amendment you just created as a buyer.

    Click the notification link to view the notification.
83. On the **Amendment 1 for Negotiation** dialog box, review the text and then click the **Acknowledge Amendments** link.
84. On the **Acknowledge Amendments** page, view the details of the amendment.

    Select the **Acknowledgment** check box to indicate that you accept the amendment.
85. Click **Submit**, then, on the **Confirmation** dialog box, click **OK**.
86. On the **Active Negotiations** page, select the row for your negotiation and click **Create Response**.
87. Begin creating your spreadsheet response. From the **Respond by Spreadsheet drop-down menu,** click **Export**.
88. In the **Export Spreadsheet** dialog box, for **Format** select **Rich style spreadsheet**.
89. Click **OK**.
90. If it displays, in the **Opening Negotiation Response** dialog box, select the **Save File** option, then click **OK**.
91. From the **Windows taskbar**, click the **Windows Explorer** icon.
92. In the **Windows Explorer window**, click the **Downloads** folder.
93. From the **Downloads** folder, open the **Negotiation…Response.zip** Zip file and double click the XML file. This will open the file in Excel.
94. In the XML file, click **Enable Editing**.
95. The spreadsheet file included in the Zip file is protected. Before entering any values, save the file with a new name, but do not change the extension.
96. The spreadsheet guides you on how to fill out the fields:
    - Fields in yellow require a response.

- Fields in green are optional.
- Some fields are protected and you cannot enter a value in them.

97. On the **General** tab, set:

Response valid until	Enter a date a month from now.
Reference Number	Enter a reference number
Note to Buyer	`We have a great deal for you.`
How many years have you been in business?	`13`
What is your corporate structure?	Click the down arrow and select **Public** from the list.

98. Click the **Lines** tab.
99. In the **1 Printers** line, in the **Response Price** column, enter: 82.
100. In the **2 Servers** line, in the **Response Price** column, enter: 450.
101. Notice that since the line for Laptops includes cost factors and attributes, you don't enter your price in the header. Instead, you enter it in the Line Price field in the Cost Factors table.
    In the **3 Laptop** line section, in the **Cost Factors** table, in the **Response Value** field enter: 430.
102. In the **Freight** cell, enter: `0.5`.
103. In the **Attributes** table, in the **Response Value** column, set:

What color?	`Black`
Size?	`Large`

104. After you have entered your response prices in the spreadsheet, in Excel, click the **Save** icon.
105. Return to the **Create Response** page in the application, and from the **Respond by Spreadsheet** drop-down menu, select **Import**.
106. In the **Import Response** dialog box, click **Choose File**.
107. In the **Open** dialog box, browse to where you saved your response XML file and select it.
108. Click **Open**.
109. In the **Import Response** dialog box, click **OK**.
110. If there are any errors in your spreadsheet file, you will see a page detailing the issues. Return to the spreadsheet, correct the errors, save the file and import it again. You can upload the spreadsheet multiple times until you have corrected all the errors. If there no errors, you will return to the **Create Response** page.
111. Click the **Lines** train stop. Your response prices have been uploaded into the line definitions.
112. Click the **Review** train stop.
113. On the **Review Response: Bid** page, review all of the sections you just set up and verify the data is correct.
114. From the **Actions** menu, select **Validate** to check your entries.
115. Correct any errors.
116. Click **Submit**.
117. From the **Confirmation** dialog box, write down the response number __________. Then click **OK**.
118. Sign out of the application and close the browser.

Award Online

119. Reopen your browser and sign in to the application as prcXX.student, where XX is the number of your student user.
120. From the **Navigator**, under **Procurement,** click **Negotiations**.
121. From the **Overview** page, click the **Tasks** tab, then click **Manage Negotiations**.
122. Search for the negotiation amendment that you just created.
123. In the **Search Results**, click the negotiation link for the negotiation amendment that you created.
124. From the **Actions** drop-down menu button, select the **Manage > Close**.
125. In the **Close Negotiation** dialog box, select **Close Immediately**.
126. In **Note to Supplier**, enter: `We will inform you shortly of our decision`**.**
127. Click **Submit**.
128. On the **Confirmation** dialog box, click **OK**.
129. On the **Auction** page, from the **Actions** drop-down menu butt, select the **Award > Award Negotiation**.
130. On the **Award Negotiation** page, click the **Lines** tab.
131. On the **Award Line** page, select **Line 1** (the **Printers** line) and click **Award**.
132. View all the responses side-by-side under the **Compare and Award Lines** section. Note that you can compare all response information not just price offered.
133. Look at the row for **Rank**, and note which supplier is ranked number **1**.
134. On the **Award Decision** line, select the check box for the supplier that is ranked number 1.
135. Click **Save and Close**.
136. On the **Award Negotiation** page, notice the progress bar indicates that a third of the award is completed. Also notice in the **Lines** table the **Printers** line is marked as awarded.
137. Highlight the second line for **Servers** and click **Award**.
138. On the **Award Line** page, view all the responses side-by-side and use the information to make your award decision by selecting the **Award Decision** check box for the supplier that is ranked number **1**.
139. Click **Save and Close**.
140. On the **Award Negotiation** page, highlight the third line for **Laptops**, and click **Award**.
141. On the **Award Line** page, view all the responses side-by-side and use the information to make your award decision by selecting the **Award Decision** check box for the supplier that is ranked number **1**.
142. Click **Save and Close**
143. On the **Confirmation** dialog box, click **OK**.
144. On the **Award Negotiation** page, review all the graphs (including savings) and all other additional information.

    In the **Awards** section, on the **Lines** tab, notice all three lines are marked as awarded.

Complete the Award

145. On the **Award Negotiation** page, click **Submit for Approval.**
146. On the **Confirmation** dialog box, click **OK**.
147. Click the **Overview** tab.
148. On the **Overview** page, refresh the display until you see in the **Recent Activity** infolet that your negotiation award is approved.
149. After the award is approved, click the **Auction** tab.
150. On the **Auction** page, from the **Actions** drop-down menu button, select the **Award > Complete Award**.
151. On the **Complete Award** dialog box, select the **Create Purchasing Documents Now** option, and click **OK**.
152. On the **Confirmation** dialog box, click **OK**.
153. On the **Create Purchasing Documents** page, click **Submit** to create the blanket purchase agreement.
154. On the **Confirmation** dialog box, click **OK**.
155. Sign out of the application and close the browser.

Practice Complete

You have successfully created a template, an amendment, responded as a supplier both online and by using spreadsheet functionality, and completed the award decision.

Activities for Lesson 16: Procurement Contracts

Demonstration 16-1: Defining Yourself as a Contract Resource

Overview

In this demonstration, you will define yourself as a contract resource.

Instructor Note: The instructor should demonstrate Practice 16-1: Defining Yourself as a Contracts Resource for this demonstration.

Demonstration 16-2: Creating a Simple Contract

Overview

In this demonstration, you will show the basic flow by creating a simple contract.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

To successfully complete this demo, you must have completed Practice 16-1: Defining Yourself as a Contracts Resource.

User Login

prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps

Navigate to the Contracts work area

1. From the **Navigator**, under **Contract Management**, click the **Contracts** work area link.
2. Click the **Tasks** panel tab**.**
3. In the **Tasks** panel drawer, click the **Create Contract** link.
4. On the **Create Contract** dialog box, enter or select values as follows:

Business Unit	US1 Business Unit
Type	Buy: No lines
Number	<your logon prefix> `US1` For example, if your sign-on is PRC25.Student, enter `PRC25 US1`
Primary Party	Lee Supplies

   For other fields, keep the default value.

5. Click **Save and Continue.** The **Edit Contract** page appears.
6. In the **Overview** tab, in the **Name** field, enter: `LS Contract` <your sign-on prefix>. For example, `LS Contract PRC00`.
7. Click the **Parties** link to open the Parties tab.

   Observe the various fields that are populated by default. Observe that you can add additional parties and additional team members.

8. Click the **Contract Terms** link to open the Contract Terms tab.

   Observe that the **Facilities Service Agreement Terms** template has been populated based on the contract type you chose earlier.

9. Notice the outline view and the text preview pane. In the outline view, click **View** and then **Expand All** to see the full outline.

   You can drag and drop the clauses in the draft to change their order. You can use commands in the Actions menu to add, update, delete and to cut and paste clauses and sections.

   Note you cannot type directly into the preview pane. To edit a clause using the rich text editor, select the clause and then click **Edit**.
10. Now you will run the Contract Expert. This wizard-like tool prompts you with questions according to pre-established rules and policies. In addition, it asks for any missing variable values that occur in the contract text.
11. Click the **Run Contract Expert** icon.
12. Contract Expert first asks you to supply values for any variables. Click the cell in the **Insurance Amount** line.
13. Enter a value for the Insurance Amount, for example, `10000`.
14. Click **Next.**
15. Next, the Contract Expert will prompt for answers to any questions. Answer **Yes** to the question **Is subcontracting or assignment allowed**.
16. Click the **Next** button. Contract Expert will show any clauses that will be inserted into the document based on your answers to the previous questions.
17. Click the **Clause Details** icon for one of the clauses to view the clause text that will be added to the contract.
18. Click the **Done** button to close the **Clause** dialog box.
19. Click **Finish** and **OK** to confirm.
20. You can see in the outline that the **Environmental & safety** clause has been inserted. If you cannot see the clauses, click **View** and then **Expand All.**
21. In the **Details** section, from the **Actions** menu, select the **Validate Contract Terms**. This checks for errors. Any error that appears must be rectified before submitting for approval.
22. If no errors exist, click **Done**.

Editing in Microsoft Word

23. Next you will use Word to review and edit your contract. This is a good way to collaborate with other reviewers.
24. From the **Terms Actions** menu, click **Download Add-in for Microsoft Word**.
25. Save the zip file to your local drive.
26. Open the zip file and double click **setup.exe** to run the installation.
27. After the add-in is installed, return to the **Edit Contract** page.
28. From the **Terms Actions** menu, click **Download Contract**.
29. On the **Download Contract** dialog box, for **File Format**, select **Word** and click **Download**.
30. On the **Opening** dialog box, select **Save File** and click **OK.**
31. **Save** your file to your local drive.
32. When asked, for **Open with**, select **Office XML Handler (default)** to process the download.
33. Click OK. Word opens and displays your contract file.
34. If Word document opens in read-only mode, click **View**, and then **Edit Document**.
35. On the tool bar, click the **Oracle Contracts** tab and point out the available actions. You can perform many of the same edits to the Word version that you can on the **Edit Contract** page.

Note that you can perform the standard Word document editing changes here, but you can also return to Oracle Contracts and search for sections and clauses to insert.

36. From the tool bar, click **Add Clause.** A Search panel appears in next to the Word document.
37. Enter the keyword `cancellation`.
38. Click the **Search** icon. If a login screen appears, log in with your User Name and password. The search results include the clause Proc - Cancellation.
39. Click the **Add** icon located under **Proc - Cancellation**. The clause is inserted into your contract document.
40. In the **Review** tab, click **Accept**, and then **Accept all changes in document**. You cannot upload a document that has unaccepted changes.
41. Save your document.
42. Back on the **Edit Contract** page, from the **Terms Actions** menu, click **Upload Document**.
43. Click **Browse**, navigate to your updated contract file, select it, and click **Open**.
44. On the **Upload Contract** dialog box, click **OK**. If there are any errors with the document, you receive an error message. This can happen if you insert a clause, but do not enter values for variables.
45. If your edits are acceptable, you receive a warning indicating that if you continue, you will overwrite the existing contract. Click **Yes**.
46. On the **Review Changes** page, you can see the changes in your uploaded contract. Click **Accept all Changes** or **Reject All Changes**.
47. Click **Yes** to the warning. The **Edit Contract** page displays the updated contract.
48. Click **Save** to save your changes.

Finish your contract and submit for approval

49. From the **Terms Actions** menu, select **Review Contract Deviations** to run the contract deviations report.

    This report provides a summary of everything non-standard about this contract, including any variations from policy (as well as from the standard language.)

    The report can be included on the approval notification for the contract via the **Generate for Approval** check box.

    You may enter in explanation text in the **Approval Abstract** text area. This area allows the contract author to provide information for the approvers. This information typically provides additional details or justification for any deviations documented in the report.
50. Click **Save and Close**.
51. Click **Submit** to submit the contract for approval. On the **Submit Contract: Review Validation Results** page, any errors or warnings are displayed. There should be no errors because you have already validated the contract.
52. Click **Next**.
53. On the **Submit Contract: Review Approvers** page, click **Submit**.

    (If you wish to approve the contract in the following optional step, write down the name of the approving sign-on before submitting.)

Approve your contract (Optional)

54. Sign out of the application.

55. Sign on as the person designated as the approver for the contract, for example, kyle.hutchins.
56. From the **Navigator**, under **Contract Management**, click the **Contracts** work area link.
57. Locate the approval request notification in the **Pending Approvals** section of the **Contracts Worklist** area. It may take a few minutes to appear after the submission in the previous step. You can access the approval request by clicking the notification.
    When the approval notification text appears, you can view the contract details.
58. When you are satisfied, click **Approve**.
59. Sign out of the application.

Demonstration Complete

In this demonstration, you have successfully created a basic contract.

Demonstration 16-3: Creating a Clause

Overview

In this demonstration, you will show how to create a contract clause, including how to define variables.

Instructor Note: The instructor should demonstrate Practice 16-3: Creating a Clause for this demonstration. Use the prcXX.instructor login instead of the prcXX.student login.

Demonstration 16-4: Creating a Section

Overview

In this demonstration, you will show how to create a contract section.

Instructor Note: The instructor should demonstrate Practice 16-4: Creating a Section for this demonstration. Use the prcXX.instructor login instead of the prcXX.student login.

Demonstration 16-5: Creating a Question and a Rule

Overview

In this demonstration, you will show how to create a question and a rule for later use when defining a contract.

Instructor Note: The instructor should demonstrate Practice 16-5: Creating a Question and a Rule for this demonstration. Use the prcXX.instructor login instead of the prcXX.student login.

Demonstration 16-6: Creating a Term Template

Overview

In this demonstration, you will show how to create a term template.

Instructor Note: The instructor should demonstrate Practice 16-6: Creating a Term Template for this demonstration. Use the prcXX.instructor login instead of the prcXX.student login.

Practice 16-1: Defining Yourself as a Contracts Resource

Overview

Before you can create contracts, you need to ensure that you are a resource for contracts and that you are defined with a role of contract administrator.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

crm_impl

Steps

Navigate to the Resource Directory Page

1. Log in to the application using the login **crm_impl**.
2. From the **Navigator**, under **Others**, click the **Resource Directory** work area link.
3. On the **Resource Directory** page, click the **Tasks** panel tab**.**
4. In the **Tasks** panel drawer, click the **Identify Resources** link.
5. On the **Identify Resources** page, in the **Person Name** field, enter the name associated with your account using the format **firstname** <space> **lastname.**
   For example, for the PRC00.Instructor account enter `PRC00 Instructor`.
6. From the **Usage**, list select **Employee.**
7. Click **Search**.
8. In the **Search Results**, select the row for your person.
9. Click **Add as Resource**.
10. On the **Add as Resource** dialog box, click **OK**.
11. On the **Add Resource Information** page, from the **Organization** list, then click **Search.**
12. In the **Organization** field, enter: `OKC%`.
13. Select **OKC:300000046987012**. (Find it by scanning for the organization ending with 7012).
14. Click **OK**.
15. On the **Add Resource Information** page, from the **Role** list, select **Contract Administrator**.
16. Click **Save and Close**.
17. Sign out of the application.

Practice Complete

You have added yourself as a contracts resource.

Practice 16-2: Creating a Simple Contract

Overview

In this practice, you will create a simple contract. .

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

You must have completed Practice 16-1: Defining Yourself as a Contracts Resource.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

1. From the **Navigator**, under **Contract Management**, click the **Contracts** work area link.
2. On the **Contracts** page, click the **Create Contract.**
3. In the **Create Contract** dialog box, set:

Business Unit	US1 Business Unit
Type	Buy: No lines
Number	`<your logon prefix> US1` For example, if your sign-on is PRC25.Student, enter `PRC25 US1`
Primary Party	From the list, select **Lee Supplies**.

   For other fields, keep the default values.
4. Click **Save and Continue.**
   The **Edit Contract** page appears.
5. On the **Edit Contract** page, in the **Overview** tab, in the **Name** field, enter: `LS Contract <your sign-on prefix>`". For example, `LS Contract PRC25`.
6. Click the **Parties** tab.
   Observe the various fields that are populated by default.
   Observe that you can add additional parties and additional team members.
7. Click the **Contract Terms** tab.
   Observe that the **Facilities Service Agreement Terms** template has been populated based on the contract type you chose earlier.
8. Notice the outline view and the text preview pane. In the outline view, click **View** and then **Expand All** to see the full outline.
   You can drag and drop the clauses in the draft to change their order. You can use commands from the **Actions** menu to add, update, delete and to cut and paste clauses and sections.
   Note you cannot type directly into the preview pane. To edit a clause using the rich text editor, you select the clause and then click **Edit**.

9. Now you will run the Contract Expert. This wizard-like tool prompts you with questions according to pre-established rules and policies. In addition, it asks for any missing variable values that occur in the contract text.
10. Click the **Run Contract Expert** icon located near the **Contract Expert Last Run** field.
11. Contract Expert first asks you to supply values for any variables.
12. In the **Run Contract Expert** dialog box, in the **Insurance Amount** row, in the **Value** field, enter: `10000`.
13. Click **Next.**
14. Next, the Contract Expert prompts for answers to any questions.
15. From the **Is subcontracting or assignment allowed**? list, select **Yes**.
16. Click **Next**.
    In the **Run Contract Expert: Review Suggested Clauses** section, Contract Expert shows any clauses that will be inserted into the document based on your answers to the previous questions.
17. Click the **Clause Details** icon for one of the clauses to view the clause text that will be added to the contract.
18. On the **Clause** dialog box, click **Done**.
19. Click **Finish**.
20. On the **Information** dialog box, click **OK**.
21. You can see in the outline that the **Environmental & safety** clause has been inserted. If you cannot see the clauses, click **View** and then **Expand All.**
22. From the **Terms Actions** menu, select **Validate Contract Terms**. This is to ensure that there are no errors. Any error that appears must be rectified before submitting the contract for approval.
23. On the **Validate Contract Terms** dialog box, click **Done**. Fix any errors before proceeding.

Finish your contract and submit for approval

24. From the **Terms Actions** menu, select **Review Contract Deviations** to run the contract deviations report.

    This report provides a summary of everything non-standard about this contract, including any variations from policy (as well as from the standard language.)

    The report can be included on the approval notification for the contract by selecting the **Generate for Approval** check box.

    The **Approval Abstract** text area allows the contract author to provide information for the approvers. This information typically provides additional details or justification for any deviations documented in the report.
25. In the **Approval Abstract** text area, enter a short note; for example: `Changed the number of days`
26. Click **Save and Close**.

    Click **Submit** to submit the contract for approval.
27. On the **Submit Contract: Review Approvers** page, record the name of the approving sign-on before submitting the contract, if you want to approve it in the following optional step.
28. Click **Submit**.

Approve your contract (Optional)

29. Sign out of the application.
30. Sign on as the person designated as the approver for the contract, for example, `kyle.hutchins`.
31. From the **Navigator**, under **Contract Management**, click the **Contracts** work area link.
32. Select the **Pending Approvals** tab.
33. Locate the approval request notification in the **Pending Approvals** tab.
    It may take a few minutes to appear after the submission in the previous step.
    You can access the approval request by clicking the notification.
    When the approval notification text appears, you can view the contract details and click **Approve** when you are satisfied.
    Alternatively, click the **Notifications** icon, and approve the contract from the **Notifications** dialog box.
34. Sign out of the application.

Practice Complete

You have successfully created a basic contract.

Practice 16-3: Creating a Clause

Overview

In this practice, you will create a contract clause that includes a variable.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

You must have completed Practice 16-1: Defining Yourself as a Contracts Resource.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Navigate to the Terms Library Page

1. From the **Navigator**, under **Contract Management**, click the **Terms Library** work area link.

Creating a clause

2. On the **Terms Library** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Create Clause** link.
4. Set:

Business Unit	US1 Business Unit
Title	Enter your sign-on number duplicated three times. For example, for PRC25.student, enter 252525.
Number	In the **Title** field, enter a clause title as PRCXX - Buy – Law, replacing XX with your sign-on number. For example, enter `PRC25 - Buy – Law.`
Display Title	Enter a display title, for example, `PRCXX Laws.`
Intent	Buy
Type	Administration
Start Date	Set to today's date

5. In the **Clause Details** section, click the **Text** tab.
6. Enter your clause text in the text editing area below. You can enter text directly or cut and paste from another source.

   If you copy text from Word or other rich text source, it is recommended to paste it into Notepad first and then copy from there into the application, to ensure that hidden or special characters do not cause issues.
7. This step is optional. Click the **Instructions** tab. Enter additional clause information such as instruction text. If you enter any text, click **Save**.
8. This step is optional. Click the **Related Clauses** tab. Add related clause information to specify alternate or exclusion rules for this clause.

Creating a variable

9. In the **Clause Details** section, click the **Text** tab to add variables to the clause text.
10. Click **Insert Variables**. A variable is populated when the clause is used either by information provided by the user or by some other structured data known in the system.
11. In the **Insert Variables** dialog box, search for the variable named **Parties**.
12. After the search completes, select the **Parties** row.
13. Click **Done**. The variable is inserted to the clause text as [@parties@].
14. Click **Submit** when finished with the clause information.
15. Click **OK** on the **Confirmation** dialog box. This submits the clause for approval.
16. Sign out of the application.

Approving your clause

17. Sign in to the application as **kyle.hutchins**, the contracts approver.
18. On the **Home** page, click the **Notifications** icon.
    The **Pending Notifications** dialog opens. You should see a notification that your clause is awaiting approval.
19. Click the notification link.
20. In the **Approval** window, click **Approve**.
21. Sign out of the application.
22. Sign back in with your student user login.
23. Click the **Notifications** icon.
    The **Notifications** dialog opens. You should see a notification that your clause has been approved.
24. Alternately, you can check the status of the clause by navigating to the **Terms Library** and searching for the clause.
25. On the **Terms Library** page, click the **Search** panel tab.
26. In the **Number** field, enter your clause number or the first digit of the clause number and %, for example 2%.
27. Click **Search**. Your clause should be visible in the **Search Results** section of the **Clauses** page, with status “Approved”.
28. Click **Done**.

Practice Complete

You have successfully created a contract clause.

Practice 16-4: Creating a Section

Overview

In this practice, you will create a contract section.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

You must have completed Practice 16-1: Defining Yourself as a Contracts Resource.

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

Navigate to the Terms Library Page

1. From the **Navigator,** under **Contract Management,** click the **Terms Library** work area link.
2. On the **Terms Library** page, click the **Tasks** panel tab**.**
3. In the **Tasks** panel drawer, click the **Create Section** link.

   Sections are used as dividers on templates and contracts to delineate sections of the document.
4. On the **Create Section** page, set:

Name	Enter a name for your section, for example `PRCXX - General Terms`, replacing XX with your sign-on number.
Description	Enter description text, for example `General terms`.
Start Date	Set to today's date.

5. Click **Save and Close**.

Practice Complete

You have successfully created a contract section.

Practice 16-5: Creating a Question and a Rule

Overview

In this practice, you will create a contract question and rule.

There are three main types of rules:

- **Clause selection:** Conditionally add clauses when the rule is true.
- **Policy deviation:** Raises an alert logging a deviation from "Policy" when the rule condition exists in a contract.
- **Template Selection:** Uses an auto-evaluated rule condition to select the contract terms template to be used in a particular authoring instance.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

You must have completed:

- Practice 16-1: Defining Yourself as a Contracts Resource
- Practice 16-3: Creating a Clause

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

Navigate to the Terms Library Page

1. From the **Navigator**, under **Contract Management,** click the **Terms Library** work area link.

Create a question

2. On the **Terms Library** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Create Question** link.
4. On the **Create Question** page, set:

Name	Enter `PRCXX Question`, for example, replacing XX with your sign-on number.
Prompt	Enter a value in the **Prompt** field. For example, `On a scale from 1 to 10, how do you rate this class?` Or you can enter your own question.
Intent	Buy
Type	Numeric

5. Click **Save and Close.**

Create a constant

6. On the **Terms Library** page, click the **Tasks** panel tab.
7. In the **Tasks** panel drawer, click the **Create Constant** link.
   You will now create a constant for a number that will be used in the evaluation of the condition.
8. On the **Create Constant** page, set:

Name	Enter `PRCXX Constant`, for example, replacing XX with your sign-on number.
Intent	Buy
Value	Enter a valid value, for example `5`.

9. Click **Save and Close**.

Create a rule

10. On the **Terms Library** page, click the **Tasks** panel tab.
11. In the **Tasks** panel drawer, click the **Create Rule** link.
12. On the **Create Rule** page, set:

Business Unit	US1 Business Unit
Type	Clause selection
Name	Enter `PRCXX Rule`, for example, replacing XX with your sign-on number.
Intent	Buy
Description	Enter a description, for example, `Question related to scaling the value.`

13. In the **Details** section, click the **Conditions** tab.
14. Click the **Add Row** icon.
15. In the new row, set:

Type	Question
Name	Select the name of the question you created in a previous step, for example `PRC25 Question`.
Operator	Select the greater-than symbol: >

16. Select the new row you've just added. The row becomes highlighted.
17. Click the **Edit Values** icon.
18. In the **Search and Select** dialog box, from the **Type** list, select **Constant.**
19. In the **Name** field, enter the constant name you created earlier in the **Name** field, for example, `PRC25 Constant`. (Hint: Enter `PRC25%` to perform a wildcard search.)
20. Click **Search**.

21. Select the row for your constant.
22. Click **OK**.
23. In the **Details** section, on the **Conditions** tab, the **Value** field is now set to your constant name.

    Next you'll specify a clause that will be added by the contract expert when your rule condition is true. The rule condition uses the operator value specified earlier to compare the value entered by the user with the constant value, also specified earlier. In this example, if a 7 is entered, it is compared with the constant 5, using the operator greater than. The value 7 is greater than 5, so the rule condition is true.
24. Click the **Results** tab.
25. In the **Clauses** section, click the **Add Row** icon.
26. In the **Add Clause** dialog box, enter the name of the clause you created earlier or search for it using a search value such as `PRC%`.
27. Click **Search**.
28. Select the row for your clause.
29. Click **OK**.
30. Click **Save**.

Practice Complete

You have successfully created a contract question and rule.

Practice 16-6: Creating a Term Template

Overview

In this practice, you will create a contract term template that incorporates the question and rule you created earlier.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

You must have completed:

- Practice 16-1: Defining Yourself as a Contracts Resource
- Practice 16-3: Creating a Clause
- Practice 16-4: Creating a Section
- Practice 16-5: Creating a Question and a Rule

User Login

prcXX.student (where XX is the number of the student user assigned to you).

Steps

Navigate to the Terms Library Page

1. From the **Navigator**, under **Contract Management,** click the **Terms Library** work area link.
2. On the **Terms Library** page, click the **Tasks** panel tab.
3. In the **Tasks** panel drawer, click the **Create Terms Template** link.

Create a Terms Template

4. On the **Create Terms Template** page, set:

Business Unit	US1 Business Unit
Name	Enter `PRCXX Terms Template 1`, for example, replacing XX with your sign-on number.
Start Date	Set to today's date.
Description	Optionally, enter a description.
Layout Template	Contract Terms Procurement
Contract Expert section: Enable	Enabled
Default Section	Payment and Insurance

5. Click **Save**.

6. Click the **Add** icon to add a new Document Type
7. Select the **Standard Purchase Order** from the **Document** Type dropdown.
8. Click **Save**.

Add a clause to the terms template

9. Click the **Clauses** tab.
10. From the **Actions** menu, click **Add Section**.
11. Click in the **New Section** field.
12. In the **Add Section** dialog box, in the **New Section** dropdown, search for and select the section you created in an earlier practice. For example, search on PRC".
13. Click **OK**.
14. Click the **Expand** icon, found in the row containing the section you added. Note that there are no clauses included in the section yet.
15. From the **Actions** menu, click **Add Clause**.
16. In the **Add Clause** dialog box, search for and select the clause you created in an earlier practice. For example, search on PRC.
17. Click **OK**. When you return to the **Edit Terms Template** page, note that the clause has been inserted into the template.
18. Click **Save**.

Validate the terms template

19. Click the **Rules** tab.
    Here you may see a rule that has been applied by default if one has been configured to apply to all templates. The rule you created earlier will not appear as it has not yet been associated to this template.
20. From the **Actions** menu, select **Validate**.
21. The **Validate Terms Template** page will display any errors it finds. You must correct the errors.
22. Click **Done**.

    When you are done adding clauses and sections to your terms template, you can submit it for approval. You must approve your template before it can be used in authoring.
23. Click **Submit**.
24. If there are no errors on the **Submit Terms Template** page, click **Submit**.
25. Sign out of the application.
26. Sign in as kyle.hutchins and approve your template.
27. Sign out of the application.

Assign a rule to the terms template and activate it

40. Sign in with your user login.
41. From the **Navigator**, under **Contract Management,** click the **Terms Library** work area link.
42. On the **Terms Library** page, click the **Search** panel tab.
43. From the **Search** dropdown, select **Rules**
44. Enter search criteria for your rule, "PRC%" for example, and click **Search**.
45. In the **Search** Results section, click your rule name to drill down into the rule.

46. On the **Edit Rule** page, click the **Terms Template Assignments** tab.
47. Click the **Add row** icon.
48. In the **Add Terms Template** dialog box, enter search criteria for your terms template, `PRC%` for example, and click **Search.**
49. Select the row for your terms template.
50. Click **OK**.
51. Click **Activate**.
52. Click **Finish**.

Practice Complete

You have successfully created a contract term template that incorporates the question and rule you created earlier.

Activities for Lesson 17: Oracle Procurement Cloud Integration

Demonstration 17-1: Looking Up Oracle Applications Cloud Information Assets

Overview

This demonstration shows how to find supporting information for Oracle Procurement Cloud – especially information related to integrations – on the Oracle Help Center, on My Oracle Support, and in the Setup and Maintenance work area in your application.

Prerequisites

Requires that the PRC_ALL role was updated as described in Practice 1-3: Updating the PRC_ALL Role.

User Login

Any Oracle Single Sign-on User Login, prc00.instructor

Restrictions

Run this demonstration only if you are the instructor. Students should not run the demonstration.

Steps:

1. Open the **Oracle Help Center:** https://docs.oracle.com/en/.
2. Click **Cloud**, and then click the **Applications** link.
3. Under **Enterprise Resource Planning**, click **Procurement**.

Information on the Oracle Help Center

4. Discuss the various types of information available on the Oracle Help Center tabs, including:
    - Get started
    - Using the products
    - Implementing, Administering, and Integrating the products
    - Analyze and report using analytics, as well as prebuilt reports
    - Video tutorials
    - Books in HTML and PDF formats
5. Click the **Books** tab.
6. Discuss the broad range of development and integration information available in guides, including:
    - REST APIs
    - File-Based Data Import
    - SOAP Web Services
    - Tables and Views
    - Creating and Administering Analytics and Reports
    - Security Reference
7. Click the **REST API for Oracle Procurement Cloud** guide link. The HTML version of the guide is displayed.

8. On the **About the REST APIs** page, under **Tasks**, expand the **Purchase Orders** API.
9. Click the **Get all purchase orders** link.

   Discuss that you can review the following information for the **Get all purchase orders** REST API:

   - Request and response parameters
   - Examples
10. Discuss the other purchase order REST APIs that are available: Communicate purchase orders, Submit purchase orders for approval, and so on.
11. Close the guide.

Information on My Oracle Support

12. Discuss that My Oracle Support includes information on a wide variety of areas, including:
    - Business Process Models
    - Technology Audit
13. Navigate to the **My Oracle Support** page for **Business Process Models** (document 1542019.1) using this link: https://support.oracle.com/epmos/faces/DocumentDisplay?id=1542019.1
14. In the **Details** section, click the **Procurement** link to go to the Business Process Models article for Procurement. https://support.oracle.com/epmos/faces/DocumentDisplay?id=1578170.1
15. Discuss how you can download a Visio business process model diagram for **Create Negotiation**, in VSD format.
16. Click the **L3 link for Create Negotiation** link to demonstrate that the Visio file is available to be downloaded, and then opened.
17. Close the **Save As** dialog box without saving the file.
18. Close My Oracle Support.

Information in Oracle Procurement Cloud: Setup and Maintenance Work Area

19. Sign in to the training environment.
20. Discuss how the types of information available within the Setup and Maintenance work area include the following:
    - Flexfields
    - Lookups
    - Profile Options
    - Enterprise Scheduler Service scheduled processes
21. From the **Navigator**, under **Others**, click the **Setup and Maintenance** work area link.
22. On the **Setup** page, select the **Procurement** offering.
23. In the **Search Tasks** field on the **Setup: Procurement page**, enter `flexfields` and click **Search**.
24. In the **Search Task Results** dialog box, click one of the flexfield **Task** links to select the **Functional Area** that the task resides in.
25. In the **Task** section, click one of the flexfield **Task** links to open the **Manage…** page for the flexfields related to the task, for example, **Manage Catalog Descriptive Flexfields**.
26. Discuss the information displayed on the **Manage…** page.

27. Click **Done**.
28. Search for the following values and repeat the tasks above:
    - lookups
    - profile options
    - scheduled process
29. Sign out of the application.

Demonstration Complete

You have shown where integration assets and other product information can be found on the Oracle Help Center, on My Oracle Support, and in the Setup and Maintenance work area.