

Oracle® iProcurement

Implementation Guide

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Oracle iProcurement Implementation Guide, Release 11i

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Send Us Your Comments

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Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle iProcurement Implementation Guide*.

See Related Documents on page xii for more Oracle Applications product information.

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Structure

1 Overview

This chapter provides an overview of the features in Oracle iProcurement.

2 Oracle Applications Setup

This chapter describes the technical implementation steps for Oracle iProcurement that would be performed by a database administrator, system administrator, or technical implementation team member. These steps are completed in Oracle Applications.

3 Document Sourcing Setup

This chapter provides an overview of the document sourcing options in Oracle iProcurement. It also includes instructions for setting up contract purchase agreements as source documents.

4 Catalog Setup and Management

This chapter provides a complete overview and setup of the Oracle iProcurement catalog.

5 Requisitions Setup

This chapter describes the implementation steps specific to requisitioning (ordering) in Oracle iProcurement.

6 Receipts

This chapter describes the implementation steps specific to receiving in Oracle iProcurement.

A Using a Spreadsheet to Load Catalog Data

This appendix explains how to create and load your catalog items into the Oracle iProcurement catalog using the spreadsheet loader.

B Using XML to Load Catalog Data

This appendix explains how to create and load your catalog items into the Oracle iProcurement catalog using the XML loader.

C Using XML to Load Catalog Schema

This appendix explains how to create and load your catalog schema (categories, descriptors, and category hierarchy) into Oracle iProcurement's catalog using the XML loader.

D Search Engine Logic

This appendix describes the search engine in detail, including setup impact on searching.

E PO History Feed File

This appendix contains detailed information about the PO reconciliation history feed file.

Related Documents

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle iProcurement. If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Documentation on *OracleMetaLink* can be found at <http://metalink.oracle.com>.

About Oracle iProcurement in Oracle Supply Chain Management

For information about new features in this release, instructions for applying patches, new and changed setup steps, descriptions of software updates, and updated implementation and user documentation, refer to the document *About Oracle iProcurement in Oracle Supply Chain Management* for your current release. This document is available on *OracleMetaLink*.

Online Documentation

All Oracle Applications documentation is available online (HTML). Online help is available for end users of Oracle iProcurement and for catalog authors. No paper user guides are available. Online help patches are available on *OracleMetaLink*.

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with Oracle Applications products. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes. You can access this user's guide online (in Oracle Applications products) by choosing Getting Started with Oracle Applications from any Oracle Applications Help file.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle Purchasing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle e-Commerce Gateway User's Guide

This guide describes how Oracle e-Commerce Gateway provides a means to conduct business with trading partners via Electronic Data Interchange (EDI). Data files are exchanged in a standard format to minimize manual effort, speed data processing, and ensure accuracy.

Oracle eTechnical Reference Manuals (eTRM)

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on *OracleMetaLink*.

Oracle Payables User's Guide

This guide describes how accounts payable transactions are created and entered in Oracle Payables. This guide also contains detailed setup information for Oracle Payables.

Oracle Purchasing User's Guide

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing

rules, and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

Oracle Self-Service Web Applications Implementation Manual

This manual contains essential information if you are implementing iProcurement 11i on Oracle Applications Release 11i.

Oracle Workflow Guide

Oracle Workflow enables you to automate and continuously improve business processes. Information of any type can be routed according to business rules.

Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout

This guide contains necessary information for customers implementing remote catalog content on a supplier's Web site or on Oracle Exchange.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Overview

This chapter provides an overview of the features in Oracle iProcurement.

This chapter covers the following topics:

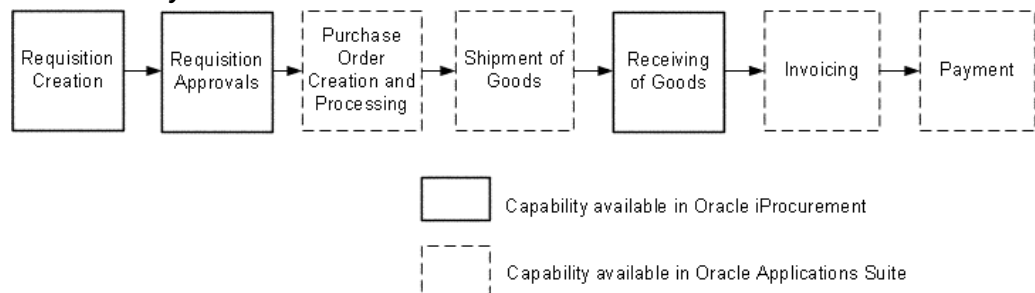
- Oracle iProcurement in Comprehensive Procure-to-Pay Flow
- Catalog Management
- Shopping
- Checkout
- Requisition Tracking and Management
- Desktop Receiving
- Oracle Services Procurement Integration

Oracle iProcurement in Comprehensive Procure-to-Pay Flow

Oracle iProcurement enables internal corporate requesters to independently order items from both local (internal) and remote (external) catalogs.

Oracle iProcurement is part of Oracle Applications, an integrated suite of E-Business solutions designed to transform your business into an E-Business. Along with the rest of the Oracle E-Business suite, Oracle iProcurement helps an enterprise streamline the procurement process with end-to-end business automation. It is the starting point for the ordering process and provides powerful self-service requisitioning capability with an intuitive, web shopping interface. It constitutes a key component of the complete procure-to-pay business flow and helps an enterprise to process and manage requisitions and receipt of the requested goods or services in an efficient and automated manner.

Procure-to-Pay Flow



Catalog Management

For complete information on catalog features, see *Catalogs and Stores*, page 4- 1 in the *Catalog Management* chapter.

Catalog Types and Sources

Oracle iProcurement offers a flexible solution to catalog and content management, enabling you to select from several approaches based on your business model.

1. Load catalogs directly into the Oracle iProcurement catalog using the catalog bulk loader, which supports catalogs formatted in XML, standard text, catalog interchange format (CIF), or cXML. Using the catalog bulk loader, you can load new catalogs, update existing catalogs, and delete catalog content. Oracle iProcurement also supports catalogs created in multiple languages and currencies to support requester communities worldwide.
2. Use the catalog extractor to load items and services from Oracle Purchasing into the iProcurement catalog.
3. Perform a punchout to an Oracle Exchange marketplace, such as Exchange.Oracle.com, or a supplier's Web store to access their catalogs. This punchout can be a direct link to the store, where the requester searches, shops, and returns items to Oracle iProcurement. Alternatively, you and the supplier can set up a transparent punchout that works in the background to return matching items from the external site directly to the requester's search results.
4. Use informational catalogs, which contain instructions or links for ordering other items or services at your company. The informational catalog enables Oracle iProcurement to be your company's portal for all ordering.

You can use any or all of these approaches for creating catalog content.

Catalogs and Stores

Stores provide an easy way for requesters to shop among a variety of catalog types and sources. Stores are an optional part of your catalog configuration. See *Shopping*, page 1- 3 .

Category and Descriptor Management

The Oracle iProcurement catalog provides uploading and online capabilities to create categories and descriptors, in addition to categories that you may have extracted and default descriptors (such as Supplier and Price) that already exist.

Security

You can use realms to control which categories or catalog sources that certain requesters can access. You can also configure stores to display only to requesters in certain operating units.

Images

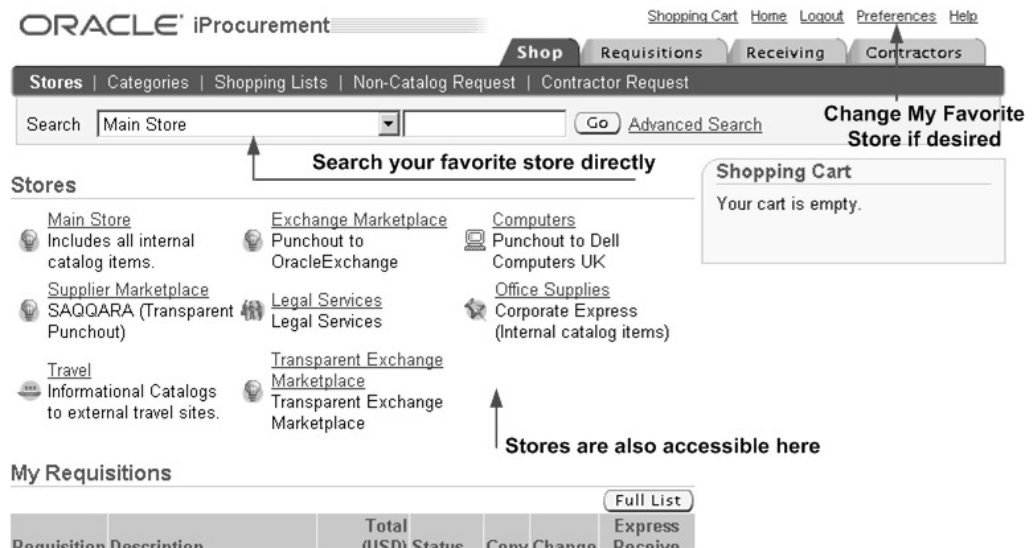
Oracle iProcurement provides several options for displaying images for items. For example, you can upload or extract images. You can also provide thumbnail images

that display next to items in the search results. (These can be separate, smaller format images, or you can use profile options to automatically size them from the larger item images.)

Shopping

Oracle iProcurement leverages the well-accepted model for web shopping incorporated into top consumer Web sites. This proven approach allows first-time, untrained requesters to find desired items or services (shop) and create requisitions (checkout), while also catering to experienced requesters by providing increased control and flexibility when creating requisitions.

Shop Home Page



The figure above shows the Shop home page, from which requesters can enter a search term to search all catalogs in a particular store, and view recent requisitions and notifications.

Stores

Oracle iProcurement employs the concept of stores. Using stores, organizations can define an intuitive collection of their content areas. Stores can be configured to include any combination of local catalogs, punchout catalogs, informational catalogs, and transparent punchout catalogs.

For most organizations, restricting access to content by role is very important. After configuring catalogs and stores, administrators can easily control which are available to different classes of requesters within the employee population.

Powerful Search Capabilities

The powerful search capabilities of Oracle iProcurement provide support to all levels of requesters—from the casual requester browsing for items to the focused requester searching for specific products. Oracle iProcurement requesters search the catalog by entering natural language text descriptions to quickly and easily find the desired

items or services. Requesters are not required to know the details of a classification format or catalog hierarchy—they simply enter search criteria ranging from partial item descriptions and part numbers to supplier names and specific product attributes (such as color or size). Using Oracle *interMedia*'s state-of-the-art technology, the search returns a list of matching items. Additional search capabilities such as comparing, sorting, filtering, and advanced search enable requesters to further refine their search.

As an alternative to performing searches, requesters can browse through the hierarchy of categories within the catalog to locate items and services. This is particularly effective when the requester is familiar with the classification of the items.

See Appendix D for detailed and complete information on searching.

Standard (or Quick) Search

Standard search looks across all the searchable descriptors for records that match all of the entered search keywords.

Expanded Search

If no results are returned from performing a standard search, requesters can find more approximate matches by using expanded search.

Advanced Search

Advanced search enables requesters to search by specific item descriptors, such as item description, supplier, manufacturer, or price. Requesters can use advanced search operators such as *with at least one of the words* or *with the exact phrase* to search for items that match a particular description, manufacturer, and price, or other combination.

Shopping Lists

Requesters can access frequently ordered items through the use of shopping lists.

Favorite List

Requesters can create their own personal favorites list for the items they most frequently order.

Public Lists

Professional buyers in Oracle Purchasing can use requisition templates to create public lists that can be accessed by requesters.

Saved Carts

Requesters can save an unlimited number of shopping carts in progress. This enables them to save selected items and return later to add more items and check out.

Non-Catalog Requests

Requesters can request items and services not found in the catalog or shopping lists by creating non-catalog requests. Using catalog administration, you can create non-catalog request templates, also known as smart forms. These templates enable you to control the non-catalog request fields that requesters complete, depending on which store or operating unit they are in. (See *Setting Up Non-Catalog Request Templates*, page 4-52.)

If you implement Oracle Services Procurement, requesters can create fixed price service requisitions using a non-catalog request. See Oracle Services Procurement, page 5-70.

Automatic Document Creation

Oracle iProcurement supports several different supplier-level document types to enable the automated document creation process. Supplier purchase contracts and quotations can be used to generate standard purchase orders. Supplier blanket purchase agreements can be used to create releases. All three document types support purchasing document creation without requiring buyer intervention.

Center-Led Procurement

Oracle iProcurement supports requisitioning against global contract agreements and global blanket agreements. These can be created by a central procurement center in your business, and then used by other organizations. For example, a requester in the German operating unit can request an item that exists on a global blanket agreement in Ireland, as long as the global agreement is enabled in the German operating unit. Oracle Purchasing will generate a standard purchase order against the global blanket agreement, and the requester will receive the item like any other.

Internally Sourced Items

In a buying organization, goods are sourced either from external suppliers or from internal inventory and warehouse locations. In Oracle iProcurement, externally sourced items are requested using purchase requisitions; internally sourced items are requested using internal requisitions. Internal requisitions are not converted into purchasing documents, such as purchase orders and blanket releases. Rather, they are converted into internal sales orders. These internal sales orders are subsequently processed, and the requested items can be received in Oracle iProcurement.

Checkout

Checkout consists of four basic components: delivery, billing, notes and attachments, and approvers.

Delivery

Each requisition includes the need-by date and time, requester, and location. These can be entered once for the entire requisition, or vary by line. Most of the information can be set up to default automatically, and requesters can change these delivery defaults in their iProcurement Preferences or on the requisition.

Delivery Information

ORACLE[®] iProcurement Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving Contractors

● ○ ○
Requisition Information Approvers Review & Submit

Checkout: Requisition Information

* Indicates required field Cancel Save Submit Edit Lines Step 1 of 3 Next

* Requisition Description MICRO-TOUCH[®] Medical Exam Gloves - Medium

<p>Delivery</p> <p><input type="checkbox"/> Urgent</p> <p>* Need-By Date 07/09/2004 23:23:00 </p> <p><small>(example: 30/08/2004 19:45:00)</small></p> <p>* Requester Smith, Mr. Jonathan </p> <p>* Deliver-To Location M1- Seattle </p> <p>Enter one-time address</p> <p>Destination Type Multiple</p> <p>Suggested Buyer Multiple </p>	<p>Billing</p> <p>Project <input type="text"/></p> <p>Task <input type="text"/></p> <p>* Taxable No </p>
---	---

The figure above shows the delivery information during the first step of the checkout process. This delivery information applies to all lines on the requisition.

Delivery Line Information

ORACLE[®] iProcurement Shopping Cart Home Logout Preferences Help

Shop Requisitions Receiving Contractors

● ○ ○
Requisition Information Approvers Review & Submit

Requisition Information: Edit Lines

* Indicates required field Return

Delivery Billing Accounts Attachments

Select Lines: Update Copy Delete

Select All | Select None

Select	Line	Description	Urgent	Need-By Date	Requester	Deliver-To Location	Destination Type	Suggested
<input type="checkbox"/>	1	MICRO-TOUCH [®] Medical Exam Gloves - Medium	<input type="checkbox"/>	26-Aug-2004 11:53:00	Smith, Mr. Jon	M1- Seattle Enter one-time address	Inventory	Stock, Ms.
<input type="checkbox"/>	2	ALLERGARD [®] Synthetic (non-latex) Surgical Gloves	<input type="checkbox"/>	26-Aug-2004 11:53:00	Smith, Mr. Jon	M1- Seattle Enter one-time address	Inventory	Stock, Ms.
<input type="checkbox"/>	3	Latex Gloves	<input type="checkbox"/>	26-Aug-2004 11:53:00	Smith, Mr. Jon	M1- Seattle Enter one-time address	Inventory	Stock, Ms.
<input type="checkbox"/>	4	Paper - requires 2-way match office supply item	<input type="checkbox"/>	07-Sep-2004 23:23:00	Smith, Mr. Jon	M1- Seattle Enter one-time address	Expense	Baker, Ms.

The figure above shows the optional Edit Lines step of the checkout process, where requesters can vary delivery information by line.

Multiple Destination Types

You can use Oracle iProcurement to create requisitions for requester-initiated inventory replenishment requests, such as stocking a shop floor crib. Alternatively, requested items can be delivered to an expense destination.

One-Time Addresses

There are occasions where requesters want items delivered to a location, such as a home address, that is not an office location or other predefined location established in the database. This is considered a one-time address and can be defined as a deliver-to location during the requisition creation process.

Integration to EAM

Oracle Enterprise Asset Management (EAM) is an Oracle Applications product that identifies, schedules, and tracks all work activity and costs related to assets throughout an organization. Oracle iProcurement requisitions update EAM work orders.

Billing

Multiple Account Distributions and Account Generation Workflow

Charge accounts for requisition lines are generated using Account Generator Workflow rules. You can split charges for requested items across multiple accounting codes, allowing multiple departments or accounts to bear the cost of items on a single requisition line. This eliminates the need to create multiple requisition lines when the same item is being requested for multiple departments.

Procurement Card Purchases

Oracle iProcurement automatically flags shopping cart lines for procurement card (P-Card) payment and defaults the P-Card number depending on the requester and supplier profiles. Two separate types of P-Cards are supported:

- **Employee P-Cards.** Companies maintain a separate employee P-Card for each requester in the company to make purchases.
- **Supplier P-Cards.** Companies maintain a single supplier P-Card for each supplier/supplier site in the system to consolidate all purchases from that supplier/supplier site.

After a requisition has been created and approved, a purchase order containing the P-Card number is created and communicated to the supplier. A P-Card reconciliation process provides the capability to electronically reconcile the P-Card statements and the corresponding purchase orders in the buyer's purchasing application.

Oracle Projects Integration

Integration with Oracle Projects and Oracle Project Manufacturing enables requesters to optionally reference project and task information on shopping cart order lines.

Oracle Grants Integration

Integration with Oracle Grants enables requesters to optionally reference projects, tasks, and award information on shopping cart order lines.

Encumbrance Support

For customers using budgetary controls, Oracle iProcurement provides the ability to check funds online before submitting requisitions. If a request carries costs past their budgetary limit, the requester is informed and can take appropriate action. Funds are automatically reserved during the requisition submit process.

Tax Integration

Oracle iProcurement enables you to specify tax information, including taxable status and tax code, if applicable. This tax information is carried forward to the purchasing document.

Notes and Attachments

Notes

During checkout, requesters can include notes to buyers and approvers. These notes can be viewed by their intended recipients later in the procurement process.

Upload and View Attachments

You can provide additional information to approvers, buyers, suppliers, and receivers by attaching text, URLs, and other file types to the requisition. These attachments can be transferred through the system to purchase orders, blanket releases, and receipts.

In Oracle iProcurement, requesters can add attachments to a requisition during checkout. Attachments can be of the following types:

- Internal to Requisition. The attachment can be viewed only from the requisition.
- To Buyer. The attachment information is passed on to the purchase order created from the requisition.
- To Approver. The attachment information can be viewed by the appropriate approvers.
- To Receiver. The attachment information can be viewed by the receiver, if the receiver is not the requester.
- To Supplier. Text and non-image file attachments can be transmitted electronically by EDI or XML to the supplier when the purchase order automatically created from the requisition is transmitted.
- Miscellaneous.

Approvers

Approval and workflow setup in Oracle Purchasing determines the approver list for each requisition. During checkout, the requester can add approvers and change the first approver in the approver list, depending on whether you allow access to this functionality (using function security). You can also customize the workflow to meet your business needs.

You can alternatively use Oracle Approvals Management to determine the approver list. Oracle Approvals Management provides a single approval management engine (AME) that can be used by multiple Oracle applications, including Oracle iProcurement.

Integration with Oracle Advanced Pricing

Any item that is associated with a contract purchase agreement can reference complex pricing rules in Oracle Advanced Pricing, such as formula-based pricing, discounts, and surcharges. If an item is associated with a contract purchase agreement, and you have set up advanced pricing, then the item's price takes into account the pricing rules during checkout.

Requisition Tracking and Management

After the requester has created and submitted a requisition, the requester can quickly and easily track further processing of the requisition using the Oracle iProcurement application.

Requisition Status

Requesters can view the status of all of their requisitions in the Requisitions tab, and perform detailed searches for requisitions. They can search by many criteria, including when the requisition was created, requester, and purchase order (or sales order) number. The requester also receives real-time notifications to keep the requester up-to-date with actions taken against the requisition. Notifications can be viewed in Oracle iProcurement, on the **Notifications** page, or by e-mail.

Requisitions Page

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) **Requisitions** [Receiving](#) [Contractors](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

Requisitions

Views

View

Indicates requisition with a pending change request.

Select requisition: 1-10

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	8668		7,500.00	28-Sep-2004 14:49:38	Approved	
<input type="radio"/>	8560	BIC Wide Body Soft Feel Retractable Ballpoint Pens	0.72	17-Sep-2004 09:19:15	Approved	4692
<input type="radio"/>	8212	First Aid Station	449.75	31-Aug-2004 08:25:29	Approved	1616-25
<input type="radio"/>	8125		10,150.00	23-Aug-2004 07:43:30	Approved	4629

The figure above shows the **Requisitions** page where requesters can view the status of their requisitions and perform actions on the requisitions.

Requisition Management

Requesters perform all requisition management activities in a single location, in the Requisitions tab:

- **Complete.** A saved cart becomes an Incomplete requisition in the Requisitions tab. The requester can select the requisition and click Complete to finish the checkout.
- **Change.** The requester can select the requisition and click Change. If the requisition is not yet placed on a purchase order, then the requisition is withdrawn from the approval process. The requester makes the desired changes and starts the checkout

process. If the requisition is already placed on a purchase order, then the changes that the requester performs become change order requests that the buyer must first approve.

- **Cancel.** The requester can select the requisition and click **Cancel** to cancel the entire requisition or individual lines. If the requisition is not yet placed on a purchase order, then the cancellation occurs immediately. If the requisition is already placed on a purchase order, then the cancellation becomes a request that the buyer must first approve.
- **Resubmit.** If the status of the requisition is **Rejected** or **Returned**, then the requester can resubmit it by clicking **Change**, making the necessary changes, and starting the checkout process.

Procure-to-Pay Lifecycle Tracking

Requesters can track the entire procure-to-pay lifecycle of their requisitions. In the **Requisitions** tab, they can click the requisition, and then click the **Details** icon for a requisition line. Each line shows the entire lifecycle of the requested item, including the purchase order, shipment, receipt, invoice, and payment.

Requisition Details: Lifecycle Tracking

ORACLE[®] iProcurement

[Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) **Requisitions** [Receiving](#) [Contractors](#)

[Requisitions](#) | [Notifications](#) | [Approvals](#)

[Requisitions: Requisitions](#) > [Requisitions Search](#) > [Requisition 5892](#) >

Requisition 5892 Line 1: Details

OK

Requisition

Description **Paper - requires 2-way match office supply item** Current Approver
 Status Approved Approver Phone
 Change History **No** Date Sent to Approver
[▶ Show Additional Information](#)

Order

Order 11412 Status **Approved**
 Buyer **Vusirikala, Mr. Raju** Buyer Phone
 Purchasing Organization **Vision Operations** Supplier Site **RVSITE**
 Supplier **Raju Supplier mfg** Supplier Phone
 Supplier Contact

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
33000	25-MAR-2002	30-MAR-2002	United Parcel Service (UPS)	1Z1RST345167883SX10P48	
35000	30-MAR-2002	05-APR-2002	Federal Express	QD1954HDO53678DHKL19	

Receipt

Receipt	Transaction Date	Net Quantity Received	Received By	Received By Phone	Items Returned
3300	04-APR-2002		10 Glenn, Mr. Tony	(650) 506-1200	No
3400	10-APR-2002		15 Green, Ms. Rachel	(650) 506-1200	Yes

Invoice

Details	Invoice	Description	Payment Status	Creation Date	On Hold Status	Invoice Amount (USD)	Amount Due (USD)	Due Date
▶ Show	3300	Invoice for PO 30000	Paid	14-APR-2002	On Hold	1000.00	200.00	31-MAR-2003

TIP Invoice amounts shown may include items other than the requested item.

Payment

Payment	Status	Payment Date	Payment Amount (USD)	Cleared Date	Payment Method	Bank
3000	Stop Initiated	14-APR-2002	800.00	05-APR-2003	Check	Bank of America

TIP Payment amounts shown may include items other than the requested item.

OK

The figure above shows the procure-to-pay lifecycle of a requisition line, including associated shipment, receipt, invoice, and payment information.

Requisition Approval Routing

Oracle iProcurement provides flexibility in streamlining the approval process:

- Vacation scheduling. Approvers can indicate dates of planned absence and specify proxy approvers for their notifications, eliminating potential bottlenecks in the approval process.
- The approval manager can reassign, forward, or request more information during the approval process.

- Approver checkout. When the approver reviews the requisition, the approver can also make changes to the requisition before approving it.

Desktop Receiving

In Oracle iProcurement, requesters can receive items, return items, correct items that have been previously received, and view their receiving transaction history.

Receiving Home Page

Receiving

Select the receiving action you want to perform.

- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

Requisitions to Receive

Click **Express Receive** to directly create receipts with the receipt values automatically defaulted. [Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
4661	TT Services	Corporate Express Office Supply	1528	
4568	Stop-Step 2-Step Ladder, 36 inch Top Step, 21 inch x 19-3/4 inch x 22-3/4 inch	Corporate Express Office Supply	1528	

My Receipts at a Glance

Click **View Details** to view receipt details. [Full List](#)

Receipt	Item Description	Receipt Date	Transaction Date	Supplier	View Details
14100	Floppy Drive - 1.44 MB - 3.5"	07-Oct-2004	07-Oct-2004	Advanced Network Devices	
14099	Software - Word Processing	07-Oct-2004	07-Oct-2004	Advanced Network Devices	

Receiving Process

- Receive**
Record receipt of the items you ordered, or receive on behalf of others.
[Receive Items](#)
- Return**
Need to send items back to the supplier?
[Return Items](#)
- Correct**
Did you record the wrong receipt quantity?
[Correct Receipts](#)
- View**
View receipts with all associated returns and corrections.
[View Receipts](#)

The figure above shows the **Receiving** home page from which all receiving activities can be performed.

Receive

Requesters can receive internally and externally sourced items, or the entire requisition, from their desktop. Receipts can be created for a single item with a single click by using the Express Receive feature. Requesters can optionally enter additional information like packing slip number, waybill/airbill number, and comments using regular receiving. Oracle iProcurement automatically records the time of the receipt. (The requester can also manually enter or change the receipt date and time.)

Oracle iProcurement supports *blind receiving*, if it is set up in Oracle Purchasing. With blind receiving, a receiver does not see the quantity ordered, quantity already received, or the receiving tolerances that have been set up.

View Shipments

Oracle iProcurement requesters can view supplier advanced shipment notices (ASNs) as well as internal shipments. Shipment information defaults into the receipt while receiving items. (See Receiving Against Intransit Shipments, page 6- 5 .)

Return

Oracle iProcurement allows the receiver to return items to suppliers. If set up, debit memos can also be generated during the return process. (See Debit Memos for Return Transactions, page 6-10.)

Correct

Oracle iProcurement allows the receiver to make corrections to the quantity received on receipts that have already been processed.

Receipt Confirmation

Oracle iProcurement also provides a workflow-driven receipt confirmation mechanism that proactively sends a notification to requesters to confirm receipt on the due date.

Oracle Services Procurement Integration

Oracle iProcurement plays a major role in Oracle Services Procurement when requisitioning temporary labor. Oracle iProcurement can also be fully utilized in requisitioning services through Oracle Services Procurement. If you have licensed and implemented Oracle Services Procurement, then there is additional setup that you can perform in Oracle iProcurement to requisition services and temporary labor. See Oracle Services Procurement, page 5-70.

Oracle Applications Setup

This chapter describes the technical implementation steps for Oracle iProcurement that would be performed by a database administrator, system administrator, or technical implementation team member. These steps are completed in Oracle Applications.

This chapter covers the following topics:

- Prerequisites
- Setup Checklists
- Set Up Function, Menu, and Data Security
- Personalize Oracle iProcurement Using Oracle Applications Framework
- Create Operating Unit-Specific Purchasing News
- Customize Operating Unit-Specific Purchasing Policies
- Customize Workflows
- Define Descriptive Flexfields on Requisitions
- Implement Custom Packages
- Modify Online Help
- Set Profile Options
- Technology Stack Upgrade

Prerequisites

The following table lists the prerequisite setup steps necessary to implement Oracle iProcurement. These steps may have been completed if you have already implemented Oracle Purchasing. See *Setting Up* in the *Oracle Purchasing User's Guide* for more information.

Oracle Purchasing Setup Steps

No.	Step	If Oracle Purchasing is Set Up	If Oracle Purchasing is Not Set Up	Information Source
1	Set Up System Administrator	Not Required	Required	Oracle Applications System Administrator's Guide
2	Define Accounting Key Flexfields	Not Required	Required	Oracle Applications Flexfields Guide
3	Set Up Calendars, Currencies, and Set of Books	Not Required	Required	Oracle General Ledger User's Guide
4	Define Human Resources Key Flexfields	Not Required	Required	Oracle Applications Flexfields Guide
5	Define Locations	Not Required	Required	Configuring, Reporting and System Administration in Oracle HRMS
6	Define Organizations and Organization Relationships	Not Required	Required	Configuring, Reporting and System Administration in Oracle HRMS
7	Convert to a Multi-Org Architecture	Not Required	Optional	Multiple Organizations in Oracle Applications
8	Define Inventory Key Flexfields	Not Required	Required	Oracle Applications Flexfields Guide
9	Define Units of Measure	Not Required	Required	Oracle Inventory User's Guide
10	Define Freight Carriers	Not Required	Optional	Oracle Inventory User's Guide
11	Define Item Attributes, Codes and Templates	Not Required	Required	Oracle Inventory User's Guide
12	Define Categories	Not Required	Required	Oracle Inventory User's Guide

No.	Step	If Oracle Purchasing is Set Up	If Oracle Purchasing is Not Set Up	Information Source
13	Define Catalog Groups	Not Required	Optional	Oracle Purchasing User's Guide
14	Enable Categories for Oracle iProcurement	Required	Required	Extractor Requirements for Purchasing Data, page 4-21
15	Set Up Personnel	Not Required	Required	Configuring, Reporting and System Administration in Oracle HRMS
16	Set Up Oracle Workflow	Not Required	Required	Oracle Workflow Guide
17	Decide How to Use the Account Generator	Not Required	Required	Oracle Workflow Guide Oracle Purchasing User's Guide
18	Open Inventory and Purchasing Accounting Periods	Not Required	Required	Oracle Inventory User's Guide Oracle Purchasing User's Guide
19	Define Subinventory Locations	Not Required	Optional	Oracle Inventory User's Guide
20	Define Cross-Reference Types	Not Required	Optional	Oracle Inventory User's Guide
21	Define Tax Codes	Not Required	Optional	Oracle Payables User's Guide
22	Define Payment Terms	Not Required	Optional	Oracle Payables User's Guide
23	Set Up Approval Information	Not Required	Required	Oracle Purchasing User's Guide
24	Define Lookups and Classes	Not Required	Required	Oracle Inventory User's Guide
25	Define Standard Attachments	Not Required	Optional	Oracle Applications Guide

No.	Step	If Oracle Purchasing is Set Up	If Oracle Purchasing is Not Set Up	Information Source
26	Define Purchasing Options	Not Required	Required	Oracle Purchasing User's Guide
27	Define Buyers	Not Required	Required	Oracle Purchasing User's Guide
28	Define Items	Not Required	Optional	Oracle Inventory User's Guide
29	Define Line Types	Not Required	Required	Oracle Purchasing User's Guide
30	Start the Purchasing Database Administrator	Not Required	Required	Oracle Purchasing User's Guide
31	Define Financial Options	Not Required	Required	Oracle Payables User's Guide
32	Define Transaction Reasons	Not Required	Optional	Oracle Purchasing User's Guide
33	Define Receiving Options	Not Required	Required	Oracle Purchasing User's Guide
34	Set Up Transaction Managers and Resubmission Intervals	Not Required	Required	Oracle System Administrator's Guide
35	Define Suppliers	Not Required	Required	Oracle Payables User's Guide
36	Set Up Workflow Options	Not Required	Required	Oracle Workflow
37	Submit Workflow-related Processes	Not Required	Required	Oracle Purchasing User's Guide
38	Define Descriptive Flexfields	Not Required	Optional	Oracle Applications Flexfields Guide
39	Set Up Automatic Sourcing	Not Required	Optional	Oracle Purchasing User's Guide

No.	Step	If Oracle Purchasing is Set Up	If Oracle Purchasing is Not Set Up	Information Source
40	Perform Additional System Administrator Setup	Not Required	Required	Oracle System Administrator's Guide
41	Define Manufacturing System and User Profiles	Not Required	Required	Oracle System Administrator's Guide

Note: If you are upgrading from a previous release, you should review *About Oracle iProcurement in Oracle Supply Chain Management* for your current release, on *OracleMetaLink*. This document discusses the features and setup that are new in this release; it is helpful to customers who are upgrading.

Setup Checklists

The following table lists the Oracle Purchasing setup steps that are specific to implementing optional features in Oracle iProcurement. These steps may have been completed if you have already implemented Oracle Purchasing.

Note: This table does not list all of the setup steps for Oracle iProcurement. It lists only the setup steps in Oracle Purchasing that are optionally used by Oracle iProcurement.

Oracle Purchasing Setup Steps Specific to Oracle iProcurement

Step	Required or Optional	Information Source
Define Requisition Templates for iProcurement Public Lists	Optional	<i>Oracle Purchasing User's Guide</i> Extracting Catalog Data from Oracle Applications, page 4-12
Define Information Templates	Optional	Define Information Templates, page 5- 6
Define Contract Purchase Agreements	Optional	<i>Oracle Purchasing User's Guide</i> Setting Up Contract Sourcing, page 3- 4
Define Shipping Networks and Customer Locations for Internal Requisitions	Required for Internal Requisition Creation	<i>Oracle Order Management User's Guide, Oracle Purchasing User's Guide, Oracle Inventory User's Guide</i> Internal Requisitions, page 5-65
Set Up P-Cards	Optional	<i>Oracle Purchasing User's Guide</i> Employee P-Cards, page 5-24 Supplier P-Cards, page 5-25 PO Extract for P-Card Reconciliation, page 5-35
Set Up Realms	Optional	Defining Realms, page 4-44
Create Commodity-Based Expense Account Rules	Optional	Expense Charge Account Rules, page 5-23
Define Non-Catalog Request Templates	Optional	Setting Up Non-Catalog Request Templates, page 4-52
Set Up E-Commerce Gateway Mapping	Required for Punchout	Bulk Loading Catalog Data, page 4-26 Define Category Mapping, page 4-29 <i>Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout</i>

The following table lists the setup steps specific to implementing features of other Oracle Applications with Oracle iProcurement. These steps may have already been completed or reviewed if you implemented Oracle Purchasing. These steps are listed in a suggested, but not required, order.

Setup Steps that Integrate with Other Oracle Applications

Number	Step	Required or Optional	Information Source
1	Encumbrance	Optional	<i>Oracle Purchasing User's Guide</i> <i>Oracle General Ledger User's Guide</i>
2	Grants Accounting	Optional	<i>Oracle Grants Accounting User's Guide</i> Grants Accounting Integration, page 5-41
3	Project Accounting	Optional	<i>Oracle Projects Implementation Guide</i> Project Accounting Integration, page 5-40
4	Project Manufacturing	Optional	<i>Oracle Project Manufacturing Implementation Manual</i> Project Accounting Integration, page 5-40
5	Advanced Pricing	Optional	<i>Oracle Advanced Pricing Implementation Manual</i> <i>Oracle Purchasing User's Guide</i> Setting Up Contract Sourcing, page 3- 4
6	Oracle Services Procurement	Optional	Oracle Services Procurement, page 5-70

The following table lists all of the setup steps associated with administering or managing Oracle iProcurement. These include important utilities, provided with Oracle iProcurement, that can enhance the requester's experience. These steps are detailed in this chapter. These steps are listed in a suggested, but not required, order.

Administrative Setup Steps for Oracle iProcurement

Number	Step	Required or Optional	Information Source
1	Set Up Function, Menu, and Data Security	Optional	Set Up Function, Menu, and Data Security, page 2- 8
2	Personalize Oracle iProcurement Using Oracle Applications Framework	Optional	Personalize Oracle iProcurement Using Oracle Applications Framework, page 2-18
3	Create Operating Unit-Specific Purchasing News	Optional	Create Operating Unit-Specific Purchasing News, page 2-20
4	Customize Operating Unit-Specific Purchasing Policies	Optional	Customize Operating Unit-Specific Purchasing Policies, page 2-21
5	Customize Workflows	Optional	Customize Workflows, page 2-22
6	Define Descriptive Flexfields on Requisitions	Optional	Define Descriptive Flexfields on Requisitions, page 2-29
7	Implement Custom Packages	Optional	Implement Custom Packages, page 2-32
8	Modify Online Help	Recommended	Modify Online Help, page 2-36
9	Set Profile Options	Required	Set Profile Options, page 2-38

Set Up Function, Menu, and Data Security

Function security can be used to restrict requester access to certain functions and actions in various pages throughout Oracle iProcurement. For example, the Express Receive buttons might be excluded in Receiving, to prevent this type of receipt creation. Function security could also be used to prevent access to the Corrections pages in Receiving.

An administrator also has the option of setting menu security. Menu security attribute settings tend to be more broad in the areas they restrict than function security attribute settings. With menu security, a requester is prevented access to entire menus and submenus within Oracle iProcurement. With this type of setting the requester might be excluded from all of receiving or all of Oracle iProcurement workflow as opposed to just a specific button or link within these modules. Due to their more specific nature, there are more function security attributes than menu security attributes. Both function and menu security attributes are defined at the responsibility level.

Setup Steps

Perform these steps if you want to modify the default function and menu security associated with the default-provided Internet Procurement responsibility.

Define responsibility:

1. Log into Oracle Applications and select the System Administrator responsibility.
2. Choose Security > Responsibility > Define to open the Responsibilities window.
3. Create a new responsibility related to iProcurement. This responsibility will be used to enforce function security.
4. Be sure to enter a Responsibility Name, Application, Responsibility Key, and Effective From Date.
5. Available From should be set to Oracle Self Service Web Application.
6. Data Group fields for Name and Application should be entered as well.
7. The Menu field should be set to Internet Procurement Home.

Exclude responsibility functions and menus:

1. In the Menu Exclusions tabbed region of the Responsibilities window, select either the Function or Menu selection to set up either function or menu security.
2. Tab to the Name field and select the appropriate function or menu to exclude.
3. Save the responsibility.

Note: If you are not implementing Oracle Services Procurement, consider excluding the Contractors tab menu and the Contractor Request sub-tab from the Internet Procurement Home menu. If you do not implement Oracle Services Procurement, the Contractor Request link and Contractors tab still appear in Oracle iProcurement; however, when the requester accesses these areas, the following message appears: *You cannot access this page because Oracle Services Procurement is not enabled. Contact your system administrator for help.* If you want to remove these areas altogether, create a custom responsibility that excludes the Contracts menu and Contractor Request submenu from the Internet Procurement Home menu.

Assign iProcurement responsibility to a requester:

1. Choose System Administrator > Security > Users > Define.
2. Search for the requester to assign to the responsibility.
3. Insert the new responsibility.
4. Save the requester record.

Oracle iProcurement Functions

The following tables list functions that can be used to establish function security in Oracle iProcurement. Only those functions that correspond to the main features in Oracle iProcurement are listed.

Functions — Requisitions Page: My Groups Requisitions

Name	System Name	Description
View My Group's Requisitions	POR_VIEW_GROUP_REQS	View requisitions created by employees in the requester's organization. The definition of a group is based on the Security Level option selected during the Document Types setup in Oracle Purchasing.
View My Group's Reqs Receive	POR_VIEW_GROUP_REQS_RECEIVE	Register requested item(s) as received
View My Group's Reqs Cancel	POR_VIEW_GROUP_REQS_CANCEL	Cancel a requisition that has been submitted for approval
View My Group's Reqs Copy	POR_VIEW_GROUP_REQS_COPY	Create a requisition by copying an existing requisition
View My Group's Reqs ReSubmit	POR_VIEW_GROUP_REQS_RESUBMIT	Resubmit requisitions that have been rejected or returned

Functions — Requisitions Page: My Requisitions

Name	System Name	Description
View My Reqs Cancel	POR_VIEW_MY_REQS_CANCEL	Function security for the Cancel button
View My Reqs Copy	POR_VIEW_MY_REQS_COPY	Function security for the Copy button
View My Reqs Receive	POR_VIEW_MY_REQS_RECEIVE	Function security for the Receive button
View My Reqs Resubmit	POR_VIEW_MY_REQS_RESUBMIT	Function security for the Resubmit button
View my Requisitions	POR_VIEW_MY_REQS	Viewing requisitions owned by a requester
View my Reqs Change Order	POR_VIEW_MY_REQS_CHANGE_ORDER	Function security to request changes and cancellations to requisition line(s) on purchase order(s).
View My Reqs Withdraw	POR_VIEW_MY_REQS_WITHDRAW	Function security for the Withdraw function of the Change button

Functions — Requisitions Page: All Requisitions

Name	System Name	Description
View All Reqs Cancel	POR_VIEW_ALL_REQS_CANCEL	Cancel a requisition that has been submitted for approval
View All Reqs Copy	POR_VIEW_ALL_REQS_COPY	Create a requisition by copying an existing requisition
View All Reqs Receive	POR_VIEW_ALL_REQS_RECEIVE	Register requested item(s) as received
View All Reqs ReSubmit	POR_VIEW_ALL_REQS_RESUBMIT	Resubmit requisitions that have been rejected or returned
View All Requisitions	POR_VIEW_ALL_REQS	View all requisitions in the requester's organization
View Reqs Change Order History	POR_VIEW_REQS_CHANGE_HISTORY	Function security for the Change History link

Functions — Approvals Status Page: Requisitions I Approved

Name	System Name	Description
View Reqs I Approved Cancel	POR_VIEW_APPR_REQS_CANCEL	Cancel a requisition that has been submitted for approval
View Reqs I Approved Copy	POR_VIEW_APPR_REQS_COPY	Create a new requisition by copying an existing one
View Reqs I Approved Receive	POR_VIEW_APPR_REQS_RECEIVE	Register requested item(s) as received
View Requisitions I Approved	POR_VIEW_APPR_REQS	View requisitions approved by a requester

Functions — Approvals Status Page: Orders to Approve

Name	System Name	Description
View Orders to Approve	POR_VIEW_TO_APPR_REQS	Ability to view orders to be approved
View Orders to Approve Cancel	POR_VIEW_TO_APPR_CANCEL	Ability to cancel requisitions I have to approve
View Orders to Approve Copy	POR_VIEW_TO_APPR_COPY	Ability to copy orders I have to approve

Functions — Approvers/Add Approvers Page

Name	System Name	Description
Add Approver	POR_ADD_APPROVER	Change the requisition approval route based on the requester's choice of first approver
Change First Approver	POR_CHANGE_FIRST_APPROVER	Change first approver
Delete Approver	POR_DELETE_APPROVER	Delete non-mandatory approvers from a requisition's document approval routing list
User Default approver list	POR_USER_DEFAULT_APPROVERS	Ignore changes and revert to the original document approval routing list
Approve or Reject a Requisition	POR_SHOW_APPROVE_REJECT_BTN	Approve or Reject a Requisition

Functions - Receive Orders Page

Name	System Name	Description
All Items to Receive	POR_ALL_ITEMS_TO_RECEIVE	Restrict a requester from receiving all items
Correct All Receipts	POR_SHOW_ALL_RCV_CORRECTIONS	Function to grant/deny access to correct all receipts
Correct Receipts	POR_SHOW_RCV_CORRECTIONS	Function to grant/deny access to correct receipts
Express Receive	POR_EXPRESS_RECEIVE	Create an Express Receipt
POR: Receive Orders	POR_RECEIVE_ORDERS	Allow a requester to receive orders
Return All Items	POR_SHOW_ALL_RCV_RETURNS	Function to grant/deny access to return all items
Return Items	POR_SHOW_RCV_RETURNS	Function to grant/deny access to return items
View All Receipts	POR_SHOW_ALL_RECEIPTS	Function to grant/deny access to view all receipts
View Receipts	POR_SHOW_VIEW_RECEIPTS	Function to grant/deny access to view receipts

Functions - Other Functions

Name	System Name	Description
Express Setup Tools	POR_SSP_EXP_SETUP	Tools used to enable express setup of employees and locations
Favorite Charge Accounts	POR_FAV_CHG_ACCT	List of Favorite Charge Accounts
POR SSP EManager	POR_SSP_ECMANAGER	Internet Procurement eContent Manager
POR SSP Home	POR_SSP_HOME	Internet Procurement Home Page

Functions - Requisition Checkout

Name	System Name	Description
Display Check Funds Button	POR_DISP_CHECKFUNDS_BUTTON	Function to control the display of the Check Funds button
Create Emergency Req	POR_CREATE_EMERG_REQ	Create emergency requisition
One Time Location	POR_ONE_TIME_LOCATION	Function security for entering a one-time address during checkout

Functions - Workflow

Name	System Name	Description
Self-Service Purchasing Receive Orders	POR_RCV_ORDERS_WF	Receive orders from Workflow
Self-Service Purchasing Resubmit Requisition	POR_RESUBMIT_URL	Resubmit requisition (called from workflow)
Self-Service Purchasing Update/Cancel Requisition	POR_UPDATE_REQ	Update or cancel requisition lines (called from workflow notifications)
Self-Service Purchasing View Requisition	POR_OPEN_REQ	View requisition (called from workflow)

Functions - Oracle Services Procurement

Name	System Name	Description
iProcurement: View all Contractor Performance Entries	ICX_POR_VIEW_CONTR_PERF	Controls access to viewing contractor performance evaluations in the Contractors tab
iProcurement: Manage all Contractor Performance Entries	ICX_POR_MANAGE_CONTR_PERF	Controls access to entering, editing, and managing performance evaluations in the Contractors tab
iProcurement: Create Contractor Performance Entries	ICX_POR_CREATE_CONTR_PERF	Controls access to entering contractor performance evaluations in the Contractors tab
iProcurement: Suggest supplier/contractor for contractor request	POR_CONTR_REQST_SUGGEST_SUPPL	Controls whether the requester can specify a suggested supplier or has to pick from one of the preferred suppliers
iProcurement: Select supplier for contractor request	POR_CONTR_REQST_SELECT_SUPPL	Controls whether all the preferred suppliers should be selected by default while the requester is creating the contractor request
View my Requisitions	POR_VIEW_MY_REQS	Controls access to viewing one's own contractor requests in the Contractors tab
View My Group's Requisitions	POR_VIEW_GROUP_REQS	Controls access to viewing contractor requests in one's group in the Contractors tab

Obsolete Functions

Name	System Name
Change Multiple Lines	POR_CHANGE_MULTI_LINES
Compare Search Results	POR_COMP_SEARCH_RESULTS
Create Emergency Requisitions	POR_EMERG_REQS
Create New Requisition	ICX_REQS
eContent Manager	POR_ECMANAGER
Emergency Req Add Approver	POR_EMERG_ADD_APPROVER
Emergency Req Change First Approver	POR_EMERG_CHANGE_FIRST_APPR
Emergency Req Change Multiple Lines	POR_EMERG_CHANGE_MULTI_LINES

Name	System Name
Emergency Req Compare	POR_EMERG_COMP_SEARCH_RESULTS
Emergency Req Delete Results	POR_EMERG_DELETE_APPROVER
Emergency Req Sort Approvers	POR_EMERG_SORT_APPROVERS
Emergency Req Use Default Approver List	POR_EMERG_USE_DEFAULT_APPROVER
Emergency Req View Approvers	POR_EMERG_VIEW_APPROVERS
Express Checkout	POR_EXPRESS_CHECKOUT
POR: Create New Requisition	POR_NEW_REQS
POR: Receive Items	POR_RECEIVE_ITEM
POR Power Checkout	POR_POWER_CHECKOUT
POR Standard Checkout	POR_STANDARD_CHECKOUT
Receiving Home Page	POR_SHOW_RCV_HOME
Reset Password	POR_RESET_PWD_FUNC
SSP Notification Reassignment	POR_NOTIFY_REASSIGN
Sort Approvers	POR_SORT_APPROVERS
View Approvers	POR_VIEW_APPROVERS
View All Reqs Complete	POR_VIEW_ALL_REQS_COMPLETE
View All Reqs Delete	POR_VIEW_ALL_REQS_DELETE
View Reqs I Approved Complete	POR_VIEW_APPR_REQS_COMPLETE
View Reqs I Approved Delete	POR_VIEW_APPR_REQS_DELETE
View Reqs I Approved Resubmit	POR_VIEW_APPR_REQS_RESUBMIT
View My Group's Reqs Complete	POR_VIEW_GROUP_REQS_COMPLETE
View My Group's Reqs Delete	POR_VIEW_GROUP_REQS_DELETE
View My Reqs Complete	POR_VIEW_MY_REQS_COMPLETE
View My Reqs Delete	POR_VIEW_MY_REQS_DELETE
View Reqs Cancel Expand	POR_VIEW_REQS_EXPAND_CANCEL
View Reqs Copy Expand	POR_VIEW_REQS_COPY_EXPAND

Name	System Name
View Reqs Receive Expand	POR_VIEW_REQS_EXPAND_RECEIVE
View Reqs Resubmit Expand	POR_VIEW_REQS_EXPAND_RESUBMIT

Oracle iProcurement Menus

The following table lists the settings for menu security. Only those menus that correspond to the main features in Oracle iProcurement are listed.

Note: If you are upgrading from a previous release, you should review *About Oracle iProcurement in Oracle Supply Chain Management* for your current release, on *OracleMetaLink*. This document discusses the features and setup that are new in this release; it is helpful to customers who are upgrading. It also includes a list of new and changed menus in this release.

Oracle iProcurement Menus

System Name	Name	Description
POR_SSP_ECMANAGER	iProcurement eContent Manager	Allow access to the iProcurement eContent Manager
ICX_POR_SSP_HOME	Internet Procurement Home	Allow a requester access to the iProcurement home page
ICX_POR_ALL_ITEMS_TO_RECEIVE	SSP5: All Items to Receive	Submenu to include a function to determine if a requester can view all items to receive
ICX_POR_RECEIVE_ORDERS	SSP5: Receiving	Submenu to include a function to determine if a requester is given access to receiving
ICX_POR_SSP5_CREATE_REQ	Create Requisition	Allow access to iProcurement requisition creation
ICX_POR_SSP5_VIEW_ALL_REQS	SSP5 - View All Requisitions	iProcurement view all requisitions submenu
ICX_POR_SSP5_VIEW_GROUP_REQ	SSP5 - View My Group's Requisitions	View my group's query submenu defined for function security
ICX_POR_SSP5_VIEW_MY_REQ	SSP5 - View My Requisitions	iProcurement view my requisitions submenu
ICX_POR_VIEW_TO_APPR_REQ	SSP5 - View Orders to Approve	iProcurement submenu for order to approve
ICX_POR_SSP5_VIEW_APPR_REQ	SSP5 - View Requisitions I Approved	iProcurement submenu for orders I have approved page
ICX_POR_WORKFLOW	Self Service Purchasing Workflow link	Allow a requester access to iProcurement workflow link

Obsolete Menus

System Name	Name
ICXPOR_LOGOFF_MENU	Logoff Menu
ICXPOR_PORTAL_MENU	Return to Portal Menu
ICXPOR_EAM_MENU	Return to EAM Menu
POR_POWER_CHECKOUT	Self Service Purchasing Power Checkout

Data Security

Data security is achieved by using securing attributes to allow rows (records) of data to be visible to specified requesters based on the specific data contained in the row. In Oracle iProcurement, securing attributes called realms are used to restrict requester access to the catalog.

The following table lists securing attributes that can be used to establish data security in Oracle iProcurement:

iProcurement Securing Attributes

Attribute	Application	Description
ICX_POR_ITEM_SOURCE_ID	Oracle Self Service Web Applications	No longer used. (If you used it in a previous release, the current release still honors it.)
RT_CATEGORY_ID	Oracle Self Service Web Applications	No longer used. (If you used it in a previous release, the current release still honors it.)
ICX_POR_REALM_ID	Oracle Self Service Web Applications	Use this attribute to secure the responsibility for category or item source realms.

For more information on restricting the catalog using realms, see *Defining Realms*, page 4-44.

Personalize Oracle iProcurement Using Oracle Applications Framework

Oracle iProcurement is built upon the Oracle Applications Framework technology. Oracle Applications Framework enables system administrators to easily personalize the user interface in Oracle iProcurement. Examples include showing, hiding, moving, or modifying regions (such as the My Requisitions section on the shop Home page), items (such as a button), or fields (such as showing the Rate Type field, which is hidden by default in the shopping cart).

Personalization: Field Displayed

ORACLE iProcurement Shopping Cart Home Logout Preferences Help Personalize Page

Shop Requisitions Receiving Contractors

Shopping Cart

Click this link to show or hide fields Save Checkout

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Delete
1	Paper - requires 2-way match office supply item	Each	1	20.00 USD	20.00	
Total					20.00	

I need a purchase order number immediately
 TIP Purchase Order number will be assigned after completing checkout.

[Return to Shopping](#) Save Checkout

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Contractors](#) | **Shopping Cart** | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#)

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When the personalization profile option is turned on, the system administrator can log on to Oracle iProcurement, click the personalization link on any page, and personalize the desired regions, items, or fields. These personalizations are then seen by users. For example, if you make the personalizations at the responsibility level, then they are visible to all users who sign on using that responsibility.

Note: The personalization profile option must be turned on to see the "Personalize Page" link. See the *Oracle Applications Framework Personalization Guide* on OracleMetaLink for details.

Personalization: Field Hidden

ORACLE iProcurement Shopping Cart Home Logout Preferences Help Personalize Page

Shop Requisitions Receiving Contractors

Shopping Cart Save Checkout

Line	Item Description	Unit	Quantity	Price	Amount (USD)	Supplier Config ID	Delete	Source Document Type	Source Document Number	Source Document Line
1	Paper - requires 2-way match office supply item	Each	3	9.99 USD	29.97			Contract Purchase Agreement	10501	
Total					29.97					

I need a purchase order number immediately
 TIP Purchase Order number will be assigned after completing checkout.

[Return to Shopping](#) Save Checkout

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Contractors](#) | **Shopping Cart** | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#)

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Note: These columns are hidden by default.

By default, Oracle iProcurement is already set up to display the optimum information to requesters. For example, the first figure above shows that by default the shopping cart shows basic item fields, such as Item Description, Unit, and Price. You can, however, additionally display one or more fields that are hidden by default. In the second figure above, the following hidden fields are now displayed: Supplier Config ID, which is used by punchout for suppliers with configured items; and Source Document Type, Source Document Number, and Source Document Line.

As you are implementing the features and setup steps described in this guide, use the personalization feature to see which fields are hidden by default or which page regions and items you want to modify.

For instructions on enabling and performing personalizations, see the *Oracle Applications Framework Personalization Guide* on OracleMetaLink. For the exact OracleMetaLink Note reference, see the *Oracle Applications System Administrator's Guide*.

Note: Before using personalization to show or hide information, check the function security options. You may be able to restrict access to a function instead. See: Setting Up Function, Menu, and Data Security, page 2- 8 .

Create Operating Unit-Specific Purchasing News

You can create purchasing news that is specific to an operating unit. Requesters will be able to view information that is pertinent only to their operating unit when accessing this area from the home page.

Purchasing News

The screenshot shows the Oracle iProcurement home page. At the top, there is a navigation bar with links for Shopping Cart, Home, Logout, Preferences, and Help. Below this is a main navigation bar with tabs for Shop, Requisitions, Receiving, and Contractors. The Shop tab is active, and a sub-navigation bar shows links for Stores, Categories, Shopping Lists, Non-Catalog Request, and Contractor Request. A search bar is present with a dropdown menu set to 'Main Store' and a 'Go' button. The main content area is divided into several sections: 'Stores' with a grid of links like 'Main Store', 'Exchange Marketplace', 'Computers', etc.; 'My Requisitions' with a table header; 'Shopping Cart' with the message 'Your cart is empty.'; and 'Purchasing News' with two checked items: 'Check frequently asked questions' and 'Review purchasing policies'. A descriptive text below the news items states: 'This is where the customer puts their own purchasing news items (this is an HTML plugin).'

The figure above shows the Purchasing News box, below the Shopping Cart box, on the home page.

Setup Steps

1. Create a directory under `OA_HTML/<language code>/`.
For example: `OA_HTML/US/operating_unit_1` where `operating_unit_1` is your help path.
2. Copy `PORPNEWS.htm` from the `OA_HTML/US/` directory to the directory that was created in step 1. Modify this file to include content specific to the operating unit.

3. Set the value for the responsibility-level profile option POR: Help Path to the location of the operating unit-specific files as specified in step 1. See Set Profile Options, page 2-38 for details.

For the example from step 1, you would enter `/operating_unit_1/` for the profile option.

Note: The POR: Help Path profile option requires a `/` at the beginning and at the end of the string. `OA_HTML` is the path of all the iProcurement HTML files and is part of the Oracle Internet Application Server (iAS) setup.

4. By default, the Purchasing News box is hidden. Use Oracle Applications Framework personalization to display the Purchasing News.

See Personalize Oracle iProcurement Using Oracle Applications Framework, page 2-18.

Profile Options

POR: Help Path

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Customize Operating Unit-Specific Purchasing Policies

Customers can provide purchasing policies that cover the same topic, but in terms appropriate to specific countries, regions, or operating units. This can be accomplished by adding an optional localization code at the end of the `anchor_name` in the HTML online Help files.

Setup Steps

1. Think of a localization code to use. For example, `ou1` for operating unit 1.
2. Copy the original `PORPOLCY.htm` file to a new file with the same name. Copy the file from `$ICX_TOP/help/<language code>`.
3. Open the new file with an HTML editor.
4. In this Help file, find the HTML anchor with the `anchor_name` `ppolicy`, as follows:

```
< A NAME = "ppolicy"></A>
```

Append the localization code for the appropriate operating unit to this anchor name. For example:

```
< A NAME="ppolicy@ou1" ></A>
```

5. Change the PORPOLCY.htm file to include the localized information to be displayed for the given operating unit.
6. Save your changes.
7. Upload the localized Help file to the database using the Oracle Applications Help System Utility. See the *Oracle Applications System Administrator's Guide* for detailed instructions on using the Help System Utility.
8. Set the profile option Help Localization Code for the appropriate responsibility to the value defined with the anchor name in the HTML code:
 - Log in to Oracle Applications and choose the System Administrator responsibility.
 - Navigate to the System Profiles window and search for the profile Help Localization Code and the appropriate responsibility (such as Internet Procurement).
 - Set the profile value to the localization code that you appended to the anchor name (**ou1** in this example) for the appropriate responsibility.

Since each responsibility is tied to an operating unit, requesters with that responsibility (such as Internet Procurement) in that operating unit will see the Purchasing Policies Help file that is appended with the localization code (**ou1** in this example).

Profile Options

None

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Customize Workflows

Oracle Workflow enables you to automate business processes by routing information according to customizable business rules. Workflows automate several procedures in Oracle Purchasing and Oracle iProcurement and are shared by these products.

This section presents a brief description of each predefined workflow used by Oracle iProcurement:

- PO Requisition Approval
- PO Create Documents
- Account Generator

- PO Send Notifications for Purchasing Documents
- Confirm Receipts
- PO Change Request Tolerance Check
- Requester Change Order Approval
- PO Change Approval for Requester

Each of these workflows consists of processes that are viewable in the Oracle Workflow Builder. Each workflow process, in turn, consists of individual function activities. The processes can be tailored to support your business practices.

For detailed information on these workflows, see the *Oracle Purchasing User's Guide*. For information on the procedures for setting them up, see the *Oracle Workflow Guide*.

PO Requisition Approval

Workflow File Name: poxwfrqa.wft

Note: If you are installing and implementing Oracle iProcurement for the first time, the name of this workflow is Requisition. For upgrading customers, the name is PO Requisition Approval.

This workflow manages all requisition approvals and is initiated when you submit a requisition in Oracle iProcurement. Approvers, upon receipt of the approval notification (via web or e-mail), may approve, reject, forward, or reassign the requisition. If approved, the notification passes to the next approver until all approvers have acted on the requisition. Finally, when all approvers have approved the requisition, the workflow process submits the requisition to the buyer or purchasing department. If the requester has the appropriate security access, the requester can override the default approver list. (See Set Up Function, Menu, and Data Security, page 2- 8 .)

Customize the attributes in this workflow to fit your business needs. The key attribute that requires consideration is Send PO Autocreate to Background. This attribute determines whether a deferred process is created at the very end of the requisition approval workflow. By default, the process defers the call to the PO Create Documents workflow by placing the call in Background mode. There is also an Online mode. For more details, see the PO Requisition Approval section of the *Oracle Purchasing User's Guide*.

PO Create Documents

Workflow File Name: poxwfatc.wft

This workflow manages the automatic creation of purchasing documents. The PO Create Documents workflow is initiated in Oracle iProcurement when you submit a requisition associated with an existing blanket purchase agreement, contract purchase agreement, or catalog quotation in Oracle Purchasing.

Customize the attributes in this workflow to fit your business needs. The attributes you must consider are listed in the following table:

Automatic Document Creation Attributes

Attributes: Display name	Attributes: Internal name	Description
Is Automatic Creation Allowed?	AUTOCREATE_DOC	Indicator (Y for Yes or N for No) of whether this workflow is initiated for all approved requisition lines. <i>Default Value: N</i>
Is Automatic Approval Allowed?	AUTO_APPROVE_DOC	Indicator of whether the purchase order approval workflow is initiated automatically after this workflow. <i>Default Value: N</i>
Should Workflow Create The Release?	CONT_WF_FOR_AC_REL_GEN	Indicator of whether this workflow creates releases or leaves them to the buyer to create using AutoCreate in Oracle Purchasing. <i>Default Value: N</i>
Should Contract be used to autocreate Doc?	USE_CONTRACT_FLAG	Indicator of whether the workflow should autocreate standard purchase orders with contract purchase agreement references. If this attribute is set to Yes and a contract exists, then the purchase order is created with the contract reference; if a contract does not exist or cannot be found, then the buyer must use AutoCreate to create the purchase order. If this attribute is set to No, then the buyer must use AutoCreate to create the purchase order. <i>Default Value: N</i>
Is Contract Required on Requisition Line?	CONTRACT_REQUIRED_FLAG	Indicator of whether a contract purchase agreement must exist on the requisition line for autocreation to generate a standard purchase order. (For example, a contract purchase agreement is referenced on a requisition line by associating a contract purchase agreement with an item using bulk loading. See Setting Up Contract Sourcing, page 3- 4 .) <i>Default Value: N</i>

Attributes: Display name	Attributes: Internal name	Description
Should non-catalog requests be autosourced from contract?	INCLUDE_NON_CATALOG_REQ_FLAG	If <i>Should Contract be used to autcreate Doc?</i> is set to Yes and <i>Is Contract Required on Requisition Line?</i> is set to No, then use this attribute to indicate whether the workflow should search for a contract purchase agreement with which to associate non-catalog requests. <i>Default Value:</i> N
Should temp labor request be autosourced from contracts?	INCLUDE_TEMP_LABOR_FLAG	If <i>Should Contract be used to autcreate Doc?</i> is set to Yes and <i>Is Contract Required on Requisition Line?</i> is set to No, then use this attribute to indicate whether the workflow should search for a contract purchase agreement with which to associate contractor requests. <i>Default value:</i> Y
Is Grouping of Requisition Line Allowed?	GROUPING_ALLOWED_FLAG	Indicator of whether the workflow should group all lines from a single requisition to a single purchase order. If this option is set to No, then each requisition line becomes a separate purchase order. <i>Default Value:</i> N
Is Grouping of One Time Address Line Allowed?	GROUP_ONE_ADDR_LINE_FLAG	Indicator of whether the workflow should group all requisition lines for the same one-time address (on a single requisition) to a single purchase order. If this option is set to No, then each requisition line becomes a separate purchase order. <i>Default Value:</i> N

See the Workflow section of the *Oracle Purchasing User's Guide* for more details on this workflow and these attributes.

Account Generator

Workflow File Name: poxwfpag.wft

During checkout, the Oracle Purchasing Account Generator builds a charge, budget, accrual, and variance account for each purchase order, release, and requisition distribution based on the distribution's destination type. Once an account

has been determined for a requisition distribution, the Account Generator populates all segments of the account.

Customize the processes in the requisitions Account Generator workflow to fit your business needs. See the Account Generator Workflow section of the *Oracle Purchasing User's Guide* for details.

PO Send Notifications for Purchasing Documents

Workflow File Name: poxwfarm.wft

The PO Send Notifications for Purchasing Documents workflow looks for documents that are incomplete, rejected, or in need of reapproval and sends notifications of the document's status to the appropriate people. You can view and respond to these notifications online or through e-mail.

Customize the messages in this workflow to fit your business needs. See the PO Send Notifications for Purchasing Documents Workflow section of the *Oracle Purchasing User's Guide* for details.

Confirm Receipts

Workflow File Name: poxwfrcv.wft

The Confirm Receipts workflow sends notifications that are visible online or through e-mail to requesters who create requisitions through Oracle iProcurement. (Online, requesters can see the notifications on the **Notifications** page in Oracle iProcurement; buyers can see the notifications in the Notifications Summary worklist in Oracle Purchasing.)

The Confirm Receipts workflow sends notifications for purchase order shipments that meet the following criteria:

- Destination or Deliver-To Type is Expense.
- Destination type is Inventory, if the profile option POR: Select Inventory Replenishment Lines for Confirm Receipts is set to Y.
- Receipt routing is Direct Delivery.
- Matching is 3-way or 4-way.
- Need-By Date/Promised Date is prior to the current date

Customize the processes or messages in this workflow to fit your business needs. See the Confirm Receipts section of the *Oracle Purchasing User's Guide* for details.

PO Change Request Tolerance Check

Workflow File Name: poxrcoa.wft

The PO Change Request Tolerance Check workflow provides the administrator the capability to customize the business rules for routing of the change request through the Oracle iProcurement user's approval hierarchy. This workflow is called for changes that requesters make to a requisition after one of its requisition lines is placed on an approved purchase order.

Customize the attributes in this workflow to fit your business needs. These attributes control whether reapproval of the change is required by the requester's approval hierarchy. Each attribute comes with an upper and lower tolerance limit. For

example, for the unit price, you define a lower tolerance limit of 20 (percent) and an upper tolerance limit of 0 (percent). In this example, a change to the price requires reapproval whenever it is decreased by more than 20 percent or whenever it is increased. The following tables list all of the attributes you can change, if desired.

The following table lists all of the percentage attributes. The values for these attributes are percentages.

Tolerance Check Attributes: Percentages

Attributes: Display Name	Attributes: Internal Name	Description
Unit Price Lower Tolerance	UNIT_PRICE_LOWER_TOL	Lower tolerance for a change to the unit price. <i>Default Value: 100</i>
Unit Price Upper Tolerance	UNIT_PRICE_UPPER_TOL	Upper tolerance for a change to the unit price. <i>Default Value: 0</i>
Line Quantity Ordered Lower Tolerance	QTY_ORDERED_LOWER_TOL	Lower tolerance for a change to the quantity. <i>Default Value: 100</i>
Line Quantity Ordered Upper Tolerance	QTY_ORDERED_UPPER_TOL	Upper tolerance for a change to the quantity. <i>Default Value: 0</i>
Requisition Total Lower Tolerance	REQ_TOTAL_LOWER_TOL	Lower tolerance for a change to the requisition total. <i>Default Value: 100</i>
Requisition Total Upper Tolerance	REQ_TOTAL_UPPER_TOL	Upper tolerance for a change to the requisition total. <i>Default Value: 0</i>
Budget Amount Lower Tolerance	BUDGET_AMOUNT_LOWER_TOL	Lower tolerance for a change to the amount on any fixed price or rate-based line, if you have licensed and implemented Oracle Services Procurement. <i>Default Value: 100</i>
Budget Amount Upper Tolerance	BUDGET_AMOUNT_UPPER_TOL	Lower tolerance for a change to the amount on any fixed price or rate-based line, if you have licensed and implemented Oracle Services Procurement. <i>Default Value: 0</i>

The following table lists all of the days attributes. The values for these attributes are in days.

Tolerance Check Attributes: Days

Attributes: Display Name	Attributes: Internal Name	Description
Need By Date Lower Tolerance	NEED_BY_DATE_LOWER_TOL	Lower tolerance for a change to the need-by date, in days. For example, the tolerance is 2 and the need-by date is 10/12/2005. The change request needs reapproval if the new need-by date is 10/09/2005 or sooner. No approval is needed if the new need-by date is 10/10/2005. <i>Default Value: 0</i>
Need By Date Upper Tolerance	NEED_BY_DATE_UPPER_TOL	Upper tolerance for a change to the need-by date. <i>Default Value: 0</i>
Start Date Lower Tolerance	START_DATE_LOWER_TOL	Lower tolerance for a change to the start date on a contractor request, if you have licensed and implemented Oracle Services Procurement. <i>Default Value: 0</i>
Start Date Upper Tolerance	START_DATE_UPPER_TOL	Upper tolerance for a change to the start date on a contractor request, if you have licensed and implemented Oracle Services Procurement. <i>Default Value: 0</i>
End Date Lower Tolerance	END_DATE_LOWER_TOL	Lower tolerance for a change to the end date on a contractor request, if you have licensed and implemented Oracle Services Procurement. <i>Default Value: 0</i>
End Date Upper Tolerance	END_DATE_UPPER_TOL	Upper tolerance for a change to the end date on a contractor request, if you have licensed and implemented Oracle Services Procurement. <i>Default Value: 0</i>

See the *Oracle Workflow Guide* for instructions on opening and modifying workflows.

Requester Change Order Approval

Workflow File Name:poreqcha.wft

The Requester Change Order Approval workflow handles changes that requesters make to a requisition after one of its requisition lines is placed on an approved purchase order.

This workflow performs the following steps:

1. After the requester makes the change, the workflow checks the change order attributes in the PO Change Request Tolerance Check workflow to see if the change requires reapproval by the requisition approval hierarchy. If it does not, then the requisition is submitted directly to the buyer for approval.
2. If the requisition changes require reapproval, then the Requester Change Order Approval workflow routes the changed requisition through the requisition approval hierarchy. (Approvers receive a notification of the changes.)
3. Once the requisition is approved, the workflow sends the changes to the buyer for acceptance or rejection. (The buyer receives a notification of the changes.)
4. Once the buyer accepts the changes, the workflow completes and initiates the PO Change Approval for Requester workflow.

Note: When a change is made to a requisition *before* any of its lines are placed on an approved purchase order, the requisition is withdrawn from the approval process. This withdrawal is handled by the requisition approval workflow, not the Requester Change Order Approval workflow.

PO Change Approval for Requester

Workflow File Name:porpocha.wft

Once the buyer accepts a change order request, this workflow initiates processes in the PO Approval workflow (poxwfpoa.wft) for determining whether the changed purchase order requires approval by the buyer's approval hierarchy.

See the information on workflow processes for approving change orders, in the *Oracle Purchasing User's Guide*.

Define Descriptive Flexfields on Requisitions

You can define descriptive flexfields on requisition headers, lines, and distributions.

Descriptive Flexfields (Header and Line)

Checkout: Requisition Information

* Indicates required field

Step 1 of 3

* Requisition Description

Region

Country Name

Country Code

Delivery

Urgent

* Need-By Date

(example: 21-Sep-2004 19:45:00)

* Requester

* Deliver-To Location

[Enter one-time address](#)

Billing

Project

Task

Expenditure Type

Expenditure Organization

Expenditure Item Date

(example: 21-Sep-2004)

+ Taxable

Additional Line Information

Service Agreement

Service Period

Service Products

Step 1 of 3

The figure above shows descriptive flexfields during the checkout process. In this example, the following header-level flexfields display in the Requisition Information section: Region, Country Name, and Country Code. The following line-level flexfields display in an Additional Line Information section: Service Agreement, Service Period, and Service Products. (The Additional Line Information section displays only if there are line-level descriptive flexfields.) Line-level descriptive flexfields can also display in the shopping cart and in the final checkout page (just before you click Submit).

Descriptive Flexfields (Distribution)

Requisition Information: Split Cost Allocation

* Indicates required field

Selected Line

Line Description	Unit	Quantity	Price	Amount (USD)
1 Unique Fountain Pen 2.5	EA	1	50.00 USD	50.00

Line Operations Accounting Flex	Percent	Quantity	Amount (USD)	Service Department
1 01-740-7699-0000-000 <small>Company-Department-Account-Sub-Account-Product</small>	100	1	50.00	
<input type="button" value="Add Another Row"/> Total	100	1	50.00	

The figure above shows descriptive flexfields at the distribution level. In this example, the descriptive flexfield is Service Department. To see descriptive flexfields at the distribution level, click Edit Lines, Accounts, and then the Split icon. Distribution flexfields can also display in the final checkout page (just before you click Submit).

Note: Once set up, flexfields display only if you use Oracle Applications Framework to display them on the desired pages. (By default, they are hidden on all pages.)

Oracle iProcurement supports global segments and a single context field. It does not support multiple context fields, nor reference fields. Support for the single context field is made possible through the context value profile options discussed below.

For example, you define the following Requisition Headers descriptive flexfields using the Descriptive Flexfield Segments window in Oracle Applications:

- Region (global segment)
- Country Name (global segment)
- Country Code (context field)
- Province (context field)

Note: The profile option *POR: Context value for Requisition header descriptive flexfield* is set to Country Code.

In this example, the following descriptive flexfields would display on the requisition header:

- Region and Country Name display because they are global segments, which always display.
- Country Code displays because it is selected in the profile option *POR: Context value for Requisition header descriptive flexfield*.

Note: Province does not display because it is a context field that is not selected in the profile option.

In summary, for each part of the requisition—header, line, distribution—Oracle iProcurement displays all global segments that you define, plus the context field that is selected in the corresponding profile option.

Setup Steps

To define descriptive flexfields:

1. Using the System Administrator responsibility, create descriptive flexfields for any or all of the following entities:
 - Requisition Headers
 - Requisition Lines
 - Requisition Distributions

Each of these three entities is already predefined in Oracle Applications. In the Descriptive Flexfields Segments window, they display in the Title field. Query the

one you want and define the desired flexfields for it. For instructions, see the *Oracle Applications Flexfields Guide*.

2. For flexfields that are context fields, select the desired flexfield in the corresponding profile option, listed in the Profile Options section below.
3. By default, the flexfields are hidden on all pages. Use Oracle Applications Framework personalization to display the flexfields on the desired pages.

See Personalize Oracle iProcurement Using Oracle Applications Framework, page 2-18.

When personalizing the desired page, the descriptive flexfield is called Flex. For example: Flex: (ReqHeaderDFF). One field is given for all flexfield segments. In the examples above, the Flex: (ReqHeaderDFF) field is given for all of the segments - Region, Country Name, and Country Code - on the **Checkout: Requisition Information** page. If you display Flex (ReqHeaderDFF), then you display Region, Country Name, and Country Code.

Profile Options

For instructions on setting these profile options, see Set Profile Options, page 2-38:

- POR: Context value for Requisition header descriptive flexfield
- POR: Context value for Requisition line descriptive flexfield
- POR: Context value for Requisition distribution descriptive flexfield

Function Security

None

Workflow

None

Implementation Considerations

If the requisition containing the descriptive flexfields is later completed, copied, changed (by the requester or approver), or resubmitted, then Oracle iProcurement assumes the same descriptive flexfields that were on the original requisition, even if the corresponding profile option now contains a different value. If descriptive flexfields are set up after the requisition's original creation, then subsequent checkout of the requisition applies the descriptive flexfields, including those designated by the profile options.

Implement Custom Packages

The following sections describe how to use a PL/SQL package to make requisition header and line customizations and how to use Oracle Applications Framework to make customizations to the default account generation and account validation procedures.

Requisition Header/Line Customizations

POR_CUSTOM_PKG provides customization hooks to perform the defaulting logic and validation of the requisition header, line, and distribution data. These

procedures are invoked from CustomReqHeaderHelper, CustomReqLineHelper, and CustomReqDistHelper classes. By default, they do not affect the existing logic and validation. POR_CUSTOM_PKG is bundled in the PORCUSTB.pls file.

For instructions on modifying PL/SQL packages, see the *Oracle Applications Developer's Guide*.

The following table describes the different procedures provided in POR_CUSTOM_PKG for requisition header, line, and distribution customizations and how they are triggered.

Requisition Header/Line Procedures

Procedure Name	Purpose	Invocation Details
CUSTOM_DEFAULT_REQ_HEADER	This procedure can be customized to include logic to default the header information for a given requisition.	This procedure is called from the executeCustomDefaultingLogic method in CustomReqHeaderHelper when a requisition is created.
CUSTOM_VALIDATE_REQ_HEADER	This procedure can be customized to include logic to validate the header information for a given requisition.	This procedure is called from the validate method in CustomReqHeaderHelper before the requisition is submitted.
CUSTOM_DEFAULT_REQ_LINE	This procedure can be used to include logic to default the information onto a requisition line.	This procedure is called from the executeCustomDefaultingLogic method in CustomReqLineHelper when a new line is added to the shopping cart.
CUSTOM_VALIDATE_REQ_LINE	This procedure can be used to include logic to validate the information on the requisition line.	This procedure is called from the validate method in CustomReqLineHelper on every page in the checkout flow.
CUSTOM_DEFAULT_REQ_DIST	This procedure can be used to include logic to default the information onto a requisition distribution.	This procedure is called from the executeCustomDefaultingLogic method in CustomReqDistHelper when a distribution is created upon entering the checkout flow.
CUSTOM_VALIDATE_REQ_DIST	This procedure can be used to include logic to validate the information on the requisition distribution.	This procedure is called from the validate method in CustomReqDistHelper on every page in the checkout flow.

Profile Options

The following profile options control whether the corresponding custom procedures should be invoked:

- POR: Enable Req Header Customization
- POR: Enable Requisition Line Customization
- POR: Enable Req Distribution Customization

Set the corresponding profile option to Yes to invoke your customized procedure. See Profile Options, page 2-38.

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Account Generator Customizations

Value changes to certain attributes on a requisition line or distribution can cause charge account re-defaulting. For example, a change to the Deliver-to Location can cause the charge account number to change. You can add to the attributes that cause charge account re-defaulting.

Setup Steps

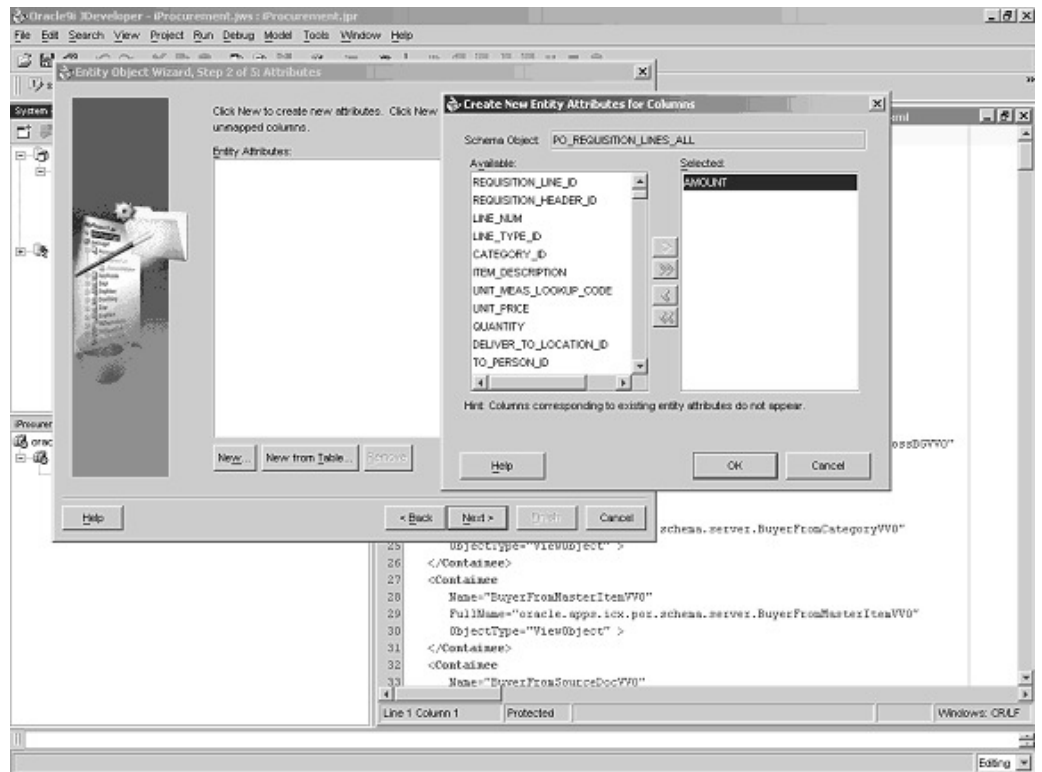
1. Extend the Entity Object for requisition lines or distributions.

The Entity Object contains all of the target attributes that can potentially cause account re-defaulting. Follow these steps:

- Since you will be extending Entity Objects (EO) in the BC4J package `oracle.apps.icx.por.schema.server`, open this package in your project.
- Select the parent EO. For requisition lines, select `oracle.apps.icx.por.schema.server.PoRequisitionLineEO`. For requisition distributions, select `oracle.apps.icx.por.schema.server.PoReqDistributionEO`.
- For instructions on these steps, see the section *Modify Entity Object Attribute Default Values*, in the *Oracle Applications Framework Developer's Guide*, for identifying the parent EO. You can find this guide on *OracleMetaLink*. (For an exact reference to the correct location on *OracleMetaLink*, see the *Oracle Applications System Administrator's Guide*.)
- In the section *Modify Entity Object Attribute Default Values*, follow the steps for creating a new, empty BC4J package to hold your custom BC4J objects and for creating a new entity object that extends the parent EO.
- In the second step of the Entity Object Wizard, click *New from Table ...* and select your target attributes.

These are the attributes, such as AMOUNT, that you want to trigger account re-defaulting when their values are changed.

Selecting Target Attributes



- Click OK, and accept the defaults for the rest of the steps in the wizard.
2. In the System Navigator panel, highlight the Entity Object that you created in the steps above, to list all of the attributes in the Entity Object.
 3. Highlight each target attribute in the Structures panel, right-click, and select the Edit option to edit each of your target attributes. The Attribute Editor appears.
 4. Select Properties from the left-hand panel. For each target attribute, add a new property in the attribute editor.
 - If your target attribute is associated with a requisition line, enter AccountLineBizAttrSet in the property name field and Y in the value field.
 - If your target attribute is associated with a requisition distribution, enter AccountDistBizAttrSet in the property name field and Y in the value field.
 - Click Add, and then OK, to save the changes.
- AccountLineBizAttrSet and AccountDistBizAttrSet include all of the attributes that trigger account re-defaulting. You have now set your target attributes to trigger account re-defaulting when the attribute's value is changed.
5. Once you have completed extending the Entity Objects, see the instructions in the section Substitute Extended BC4J Objects for Parent BC4J Objects, in the *Oracle Applications Framework Developer's Guide*, to substitute your extended BC4J object for the parent BC4J object.
 6. Restart the Oracle Internet Application Server (iAS) after these changes.

Profile Options

None

Function Security

None

Workflow

None

Implementation Considerations

Performing the charge account customizations is not the same as modifying the Account Generator workflow. The customizations performed in this step determine what triggers account re-defaulting. Once triggered, the Account Generator workflow defaults the correct account.

Modify Online Help

The online Help is available as Oracle Applications Help. All the Help documents and graphic files are stored in the database. The Help documents are in HTML format. You may modify the Help content by using any commercial HTML editor.

Refer to the *Oracle Applications System Administrator's Guide* for detailed instructions on modifying and updating Help files.

Oracle iProcurement consists of two sets of Help files:

- The first set appears when a requester clicks the Help icon in Oracle iProcurement.
- The second set appears when the catalog administrator clicks the Help icon in the eContent Manager. Only someone logging in with the iProcurement Catalog Administration responsibility has access to this second set of Help files.

Purchasing Policies and Support

Both the iProcurement and eContent Manager online Help contain placeholder Help files for you to add instructions specific to your company's processes.

iProcurement Placeholder Help

Additional Help

[Setting Preferences](#)

[Managing Notifications](#)

[Purchasing Policies](#)

[Contacting the Purchasing Department](#)

[Contacting Technical Support](#)

[Documentation Accessibility](#)

In the Oracle iProcurement Help, the placeholder files are in an Additional Help section. The placeholder files contain placeholder text. For example, the file Contacting the Purchasing Department contains the following text: *This is a placeholder. Create a file*

detailing the procedure for contacting your Purchasing Department and replace this file. The placeholder files in the iProcurement Help are as follows:

- Purchasing Policies (PORPOLCY.htm)

Note: You may already have customized PORPOLCY.htm by operating unit in Customize Operating Unit-Specific Purchasing Policies, page 2-21.

- Contacting the Purchasing Department (PORCPURC.htm)
- Contacting Technical Support (PORCTECH.htm)

eContent Manager Placeholder Help

Additional Information

[Translating Data](#)
[Contacting Technical Support](#)
[Documentation Accessibility](#)

The placeholder file used in the eContent Manager Help is Contacting Technical Support (PORCTECH.htm), in the Additional Information section.

Particularly for the iProcurement Help files, which requesters see, you should modify or replace these files with files of your own, or remove them from the Additional Help section of the iProcurement main Help page (PORINDEX.htm) or the iProcurement Catalog Administration main Help page (PORCATIX.htm).

Oracle Services Procurement

If you are not implementing Oracle Services Procurement, you may want to remove the online Help for that application.

iProcurement Contractor Request Help

Contractor Requests

[Creating Contractor Requests](#)
[Assigning Contractors](#)
[Finding and Tracking Contractor Requests](#)
[Evaluating Contractors](#)

iProcurement Contractor Request Receiving Help

Receiving Items

[Finding Items to Receive](#)

[Receipt Notifications](#)

[Receiving Intransit Shipments](#)

[Receiving Contractor Requests](#)

[Returns and Corrections](#)

The figures above show the Contractor Request section and Receiving Items section of the iProcurement Help. If you want to remove access to the Contractor Request Help files, then modify the iProcurement main Help page (PORINDEX.htm) to remove the Contractor Request section and links:

- [Creating Contractor Requests \(PORSRVCR.htm\)](#)
- [Assigning Contractors \(PORSRVAS.htm\)](#)
- [Finding and Tracking Contractor Requests \(PORSRVTR.htm\)](#)
- [Evaluating Contractors \(PORSRVEV.htm\)](#)
- [Receiving Contractor Requests \(PORSRVRV.htm\)](#)

Set Profile Options

A number of profile options govern the behavior of Oracle iProcurement. During implementation, you must set a value for each profile option to specify how Oracle iProcurement controls access to and processes data.

The tables that follow display the profile options applicable to Oracle iProcurement and are separated into the following groups:

- Profile Options Set by System Administrator
- Profile Options Set by User
- Profile Options Set for Oracle Services Procurement

Set Profile Options:

Each setup step in this implementation guide lists the profile options that need to be set for that feature. You do not need to set all profile options now, but can use the tables below as a reference when you do set them.

1. Log on to Oracle Applications using the System Administrator responsibility.
2. Use the following navigation: Profile > System.
3. In the System Profile Values window, search for and set the desired profile options.

See the *Oracle Applications System Administrator's Guide* for more details.

Note: When you update a Site-level profile option, you must restart the Oracle Internet Application Server (iAS) for the change to take effect.

The following profile options do not correspond to a setup step later in this guide, so you may want to set them now or note to come back to them later:

- POR: Enable Check Funds (if you use encumbrance)
- POR: Use Sequence for Requisition Numbering
- Profile Options Set by Users, page 2-65

See the descriptions of these profile options in the tables below.

Profile Options Set by System Administrator

The following table lists the profile options specific to Oracle iProcurement that should be set by the system administrator.

- Some of the profile options listed below are shared by several applications, such as Oracle Purchasing and other Self Service Web Applications. For more information on these applications, refer to the Related Documents section in the Preface of this guide.
- The profile options are listed in an alphabetical order that ignores the placement of spaces in their names, making them easier to find in the table. In the application, profiles are displayed in pure alphabetical format, which includes the space character and displays the profiles in a slightly different order.

The Level indicates at which level the profile can be set. The levels are:

- Site
- Application
- Responsibility
- User

Required or Optional indicates whether the profile option is required (must be set with a value) for Oracle iProcurement to operate.

OBSOLETE indicates that the profile option no longer exists or, if it exists, is no longer used.

Profile Options Defined by System Administrator

Profile Option Name	Level	Profile Option Description
Application Framework Agent (Required)	Site Application Responsibility User	HTTP server that is used by the Oracle Self-Service Framework application. The system administrator who configured Oracle Self-Service Framework should already have set this profile option. If requesters experience errors on the Search Results page after first adding an item to the cart, you may need to remove the trailing slash from this profile option value. <i>Default Value:</i> No default

Profile Option Name	Level	Profile Option Description
Apps Servlet Agent (Required)	Site Application Responsibility User	The URL, including the hostname and port number, from where the Oracle iProcurement server is running. <i>Default Value:</i> No default
Attachment File Directory (Optional)	-	OBSOLETE
ECX: Log File Path (Optional)	Site	Directory where the Oracle XML Gateway engine writes its log files. The directory must be one of the valid directories specified in the <i>UTL_FILE_DIR</i> parameter in the <i>init<SID>.ora</i> file in your Oracle Applications 11i instance. This must be an absolute path and cannot contain a symbolic link or other operating system specific parameters. <i>Default Value:</i> No default
FND: NATIVE CLIENT ENCODING (Optional)	Site Application Responsibility User	Encoding that you want to default into the spreadsheet that you download from the Download Instructions and Templates page in the eContent Manager (accessible through the iProcurement Catalog Administration responsibility). For example, if you select the Cp1252 encoding for this profile option (also displayed as the technical name WE8MSWIN1252), the #ENCODING field in the spreadsheet template defaults to Cp1252. See Appendix A for more information about encoding in spreadsheet load files. <i>Default Value:</i> WE8MSWIN1252
Help Localization Code (Optional)	Responsibility User	Indicates the localization code for localized help files. See the <i>Oracle Applications System Administrator's Guide</i> for complete details. <i>Default Value:</i> No default

Profile Option Name	Level	Profile Option Description
HR:Cross Business Groups (Optional)	Site	<p>This profile affects the suggested buyer, global requester, and global approver features. When set to <i>Yes</i>, buyers from different business groups can be assigned (or defaulted) to a given requisition line, approval lists can include approvers outside the requester's business group, and the requester field can include requesters outside the user's business group.</p> <p><i>Default Value:</i> Yes</p>
ICX: Client IANA Encoding (Required)	Site	<p>Character set encoding (such as UTF-8) used by the application server to generate HTML for the browser. This encoding determines the way data is sent to the browser and rendered.</p> <p><i>Default Value:</i> Western European (ISO-8859-1)</p>
ICX: Date Format Mask (Optional)	Site User	<p>Determines the date format mask to use. The American English default is DD-MON-RRRR, for example, 12-NOV-2002. For year 2000 compliance, all year formats are converted to RRRR, which accepts four-digit century and year entries verbatim (1950 is stored as 1950) and converts two-digit year entries as follows:</p> <p>Entries of 00 to 49 are converted to 2000 to 2049, respectively.</p> <p>Entries of 50 to 99 are converted to 1950 to 1999, respectively.</p> <p>For example, if a requester enters 50 for the year, the year is converted and stored as 1950. If a requester enters 1950. If a requester enters 49, the year is converted and stored as 2049.</p> <p><i>Default Value:</i> Depends on language</p>

Profile Option Name	Level	Profile Option Description
ICX: Days Needed By (Optional)	Site Application Responsibility User	Determines the number of days until the requester needs the order. This value is used to calculate the need-by date. <i>Default Value: 2</i>
ICX: Language (Optional)	Site User	Determines the default session language. <i>Default Value: No default</i>
ICX: Limit connect (Optional)	Site User	Determines the maximum number of page hits per session. <i>Default Value: 1000</i>
ICX: Limit time (Optional)	Site User	Determines the maximum number of hours a requester can be logged on per session. <i>Default Value: 4</i>
ICX: Numeric characters (Optional)	Site User	Enter the preferred decimal and group separators you want to display for numbers. For example, if you enter „, as the value for this profile option, you indicate that the decimal separator is a period and the group separator is a comma. In this example, if you enter these two values at the site level, all requesters in Oracle iProcurement for the specified site will see the number three thousand as 3,000.00. If the value is entered as „. for the profile option, three thousand would display as 3.000,00. <i>Default Value: No default</i> (If this profile option is blank, the decimal and group separators are obtained from the nls_numeric_parameters setting in the database.)
ICX: Override Location Flag (Optional)	Site Application Responsibility User	Determines whether the default location to deliver orders can be overridden. <i>Default Value: Yes</i>

Profile Option Name	Level	Profile Option Description
ICX: Override Requestor (Optional)	Site Application Responsibility User	<p>Determines whether a requisition preparer can override the default requester.</p> <p>No means the preparer cannot override the default requester.</p> <p>By All means the preparer can override the default requester with any operating unit (not just his own). *</p> <p>Within Organization means the preparer can select only requesters in his operating unit. *</p> <p>* If HR: Cross Business Group is set to Yes, then the requester can select a requester in any other business group.</p> <p><i>Default Value:</i> No default</p>
ICX: Requisition Server (Optional)	Site Responsibility	<p>The hostname and port for the Oracle Internet Application Server (iAS) where Oracle iProcurement is installed and running.</p> <p><i>Default Value:</i> No default</p>
MRP: Default Sourcing Assignment Set (Optional)	Site Responsibility User	<p>Sourcing rules dictate which supplier or internal organization will supply a given requisitioned item. Sourcing rules are utilized by Oracle iProcurement so that a default source can be generated by the application. In Oracle iProcurement only those sourcing rules that have been assigned to the assignment set defined in this profile will be used when the sourcing logic is called.</p> <p>Note: This profile option is shared with other Oracle Applications. Use caution when setting it.</p> <p><i>Default Value:</i> No default</p>
PA: Allow Override of PA Distribution in AP/PO (Optional)	Site Application Responsibility User	<p>If this profile value is set to Yes, only then will a requester be able to make project related changes to the charge account information on the Split Cost Allocation page.</p> <p><i>Default Value:</i> No default</p>

Profile Option Name	Level	Profile Option Description
PO: Allow Requisition Approval Forward Action (Optional)	Site	When this profile is set to Yes, then Approve, Reject, Forward, and Approve and Forward actions are allowed in a requisition approval notification. Otherwise, only Approve and Reject actions are allowed. <i>Default Value:</i> Yes
PO: Legal Requisition Type (Optional)	Site Application Responsibility	Indicates whether requesters can enter internal requisitions sourced from stock by means of an internal sales order, purchase requisitions sourced from a supplier by means of a purchase order, or both types. Valid values are Both, Internal, and Purchase. <i>Default Value:</i> No default (If this profile option is blank, Oracle iProcurement assumes the value is Both.)
PO: Notification Lines Display Limit (Optional)	Site Application Responsibility User	OBSOLETE This profile option is still used by Oracle Purchasing, but not Oracle iProcurement.

Profile Option Name	Level	Profile Option Description
PO:Workflow Processing Mode (Optional)	Site Application Responsibility User	<p>Affects the performance of the Purchasing approval workflow processes. Online completes an entire approval workflow process before letting you proceed to the next activity. Background allows you to proceed to the next activity while the approval process completes in the background. Whichever option you choose, you can always view the current status of a requisition or purchase order through the Requisitions Summary or Purchase Orders Summary windows.</p> <p>When this profile option is set to <i>Background</i>, you must start the Workflow Background Process, which you access through the System Administration responsibility. It is recommended that you set this process to run frequently, if you are using it for Background mode approvals.</p> <p><i>Default Value:</i> No default</p>
POR: Allow Manual Selection of Source (Optional)	Site Responsibility User	<p>If set to <i>Yes</i> and PO: Legal Requisition Type is Internal or Both, then the search results will display the "Click here to select a source" link for all internally orderable items. If set to <i>No</i>, then the "select source" link will not be shown. (That is, no distinction will be made between strictly purchasable items and items that are internally orderable.)</p> <p><i>Default Value:</i> No</p>

Profile Option Name	Level	Profile Option Description
POR: Allow p-card use with encumbrance (Optional)	Site Application Responsibility User	<p>This profile controls whether items on a requisition can be charged to P-Cards (both employee and supplier) when encumbrance is turned on. It can be set to Yes or No to control the behavior at the requester and responsibility level. When set to Yes, all eligible items can be charged to a P-Card even when encumbrance is turned on. For all purchase orders charged to a P-Card, the purchase order encumbrance should be manually relieved using Oracle General Ledger.</p> <p><i>Default Value:</i> No default</p>
POR: Amount Based Services Line Type (Optional)	Site	<p>Determines the line type for amount-based non-catalog requests. An amount-based request is expressed in monetary terms - for example, 500 USD worth of service.</p> <p>The value selected here should be distinct from the values selected for POR: Goods Line Type and POR: Rate Based Services Line Type.</p> <p>You can select only line types with a Purchase Basis of Services and a Value Basis of Amount for this profile option. If Oracle Services Procurement is licensed and implemented, then you can select a Value Basis of Fixed Price or Amount.</p> <p><i>Default Value:</i> No default</p>

Profile Option Name	Level	Profile Option Description
POR: Apply Category Mapping (Optional)	Site	<p>Set this profile option if you want to determine whether to apply category mappings defined in Oracle e-Commerce Gateway to uploaded catalog files. During loading, you can choose a Yes or No option whether you want to apply category mapping to the file. This profile option determines what the default selection for that option will be. If you set this profile option to <i>Yes</i>, by default the loader will apply category mapping to the file, unless you choose otherwise on the Upload Items & Price Lists page. If you set this profile option to <i>No</i>, by default the loader will not apply category mapping to the file, unless you choose otherwise. For more details, see Define Category Mapping, page 4-29.</p> <p><i>Default Value:</i> No</p>
POR: Apply Expense Account Rules to Favorite Charge Accounts (Optional)	Site Application Responsibility User	<p>Set this profile option to Yes when you want the Expense Account Rules to apply to the requester's Favorite Charge Accounts.</p> <p><i>Default Value:</i> No</p>
POR: Approved Pricing Only (Optional)	Site User	<p>Restricts requester access to only those items associated with blanket purchase agreements, catalog quotations, and requisition templates. For example, item AB22ZL exists in the catalog, but is not associated with a blanket purchase agreement, catalog quotation, or requisition template. (For example, it was uploaded to the catalog.) When requesters search for item AB22ZL, it does not appear in their search results when this profile is set to Yes.</p> <p><i>Default Value:</i> No</p>

Profile Option Name	Level	Profile Option Description
POR: Bulk Load for All Business Groups (Optional)	Site Responsibility User	<p>When this profile option is set to <i>No</i>, the person uploading or mass deleting catalog items can specify only operating units in that person's business group. When this profile option is set to <i>Yes</i>, the person uploading or mass deleting catalog items can specify any operating unit, even in another business group.</p> <p>This profile option affects the Upload Items & Price Lists page when uploading a file that specifies operating units, the Specify Options page when selecting an operating unit for the file, and the Mass Delete page when selecting an operating unit for which to mass delete items.</p> <p><i>Default Value:</i> No</p>
POR: Bulk Loader/Extractor Commit Size (Optional)	Site	<p>Determines the batch size used to commit records to catalog tables when uploading, extracting, or purging data. You can change the default setting depending on the volume of purchasing data you expect to extract or upload and your database configuration. For example, if the commit size is exceptionally large, errors may occur. If the value is too small, there may be performance issues. Contact your database administrator to see whether you should change the default commit size.</p> <p><i>Default Value:</i> 2500</p>

Profile Option Name	Level	Profile Option Description
POR : CA Certificate File Name (Optional)	Site	<p>This profile option is used by punchout and transparent punchout catalogs when those catalogs reside on a secure site. (See Types of Catalogs, page 4- 2.) It specifies the file name that includes the certificates your company's server is willing to accept. This file should be readable and should be accessible from the middle tier. If you have multiple JVMs, then this directory should be accessible from all the JVMs. By default you can use the file \$APACHE_TOP/Apache/conf/ssl.crt/ca-bundle.crt, where \$APACHE_TOP is the root directory where the Oracle Internet Application Server (iAS) is installed. The ca-bundle.crt file includes certificates from various signing authorities. For more information, see the <i>Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout</i>.</p> <p><i>Default Value:</i> No default</p>
POR: Catalog Bulk Load Directory (Required)	Site	<p>Specifies the directory path used to store catalog files that are submitted for loading into Oracle iProcurement. When the catalog administrator submits a catalog to load into Oracle iProcurement, the catalog file is uploaded to the path specified in this profile option. The catalog loader then processes the file from this location. Ensure that both the loader and middle tier have read-write access to this directory. You should enter a read-write access directory that is valid in your system.</p> <p><i>Default Value:</i> No default (If this profile option is blank, /tmp/ is assumed.)</p>
POR: Catalog Bulk Loader Host	-	OBSOLETE

Profile Option Name	Level	Profile Option Description
POR: Change Catalog Language (Optional)	Site Application Responsibility User	<p>If catalog items exist in multiple languages, requesters can search for items in a language other than their default session language. For example, if an item exists only in the German version of the catalog, requesters will not find it unless they change their search language to German, using the Change Catalog Language link on the Shop home and search results pages.</p> <p>Set this profile option to <i>Yes</i> to enable requesters to change their search language. Set this profile option to <i>No</i> to hide the Change Catalog Language link, to restrict requesters to purchasing items only in the default session language. You should set this profile option to <i>No</i> if you do not want requesters to purchase items that are available in languages other than their session language.</p> <p><i>Default Value:</i> No</p>
POR : Cleanup Thread Interval (Optional)	Site	<p>Specifies a number to indicate how often, in milliseconds, unused requisition objects are removed from the object cache in the middle tier. Entering a value of 0 or null means no cleanup.</p> <p><i>Default Value:</i> No default</p>
POR: Context value for Requisition distribution descriptive flexfield (Optional)	Site	<p>Determines which context-sensitive descriptive flexfield Oracle iProcurement uses for requisition distributions. See Define Descriptive Flexfields on Requisitions, page 2-29.</p> <p><i>Default Value:</i> No default</p>
POR: Context value for Requisition header descriptive flexfield (Optional)	Site	<p>Determines which context-sensitive descriptive flexfield Oracle iProcurement uses for requisition headers. See Define Descriptive Flexfields on Requisitions, page 2-29.</p> <p><i>Default Value:</i> No default</p>

Profile Option Name	Level	Profile Option Description
POR: Context value for Requisition line descriptive flexfield (Optional)	Site	Determines which context-sensitive descriptive flexfield Oracle iProcurement uses for requisition lines. See Define Descriptive Flexfields on Requisitions, page 2-29. <i>Default Value:</i> No default
POR: Debugging	-	OBSOLETE
POR : Default Currency Conversion Rate Type (Optional)	Site Application Responsibility User	Use this profile option to specify the default exchange rate type. This rate is used when creating non-catalog requests, when converting an uploaded item's transactional price into a requester's functional price, when converting a punchout or transparent punchout item's transactional price into the functional price, or when exchange rates cannot be found during contractor assignment. If you will be converting prices of punchout or transparent punchout items, this profile option must be set to either Corporate or Spot (not User). Otherwise, the requester will receive an error message during checkout that no exchange rate exists and will not be able to check out the item. <i>Default Value:</i> No default
POR: Display Legacy Accounting Flex UI (Optional)	Site Application Responsibility User	Determines whether the charge account key flexfield user interface from previous releases is used on the Edit Lines page during checkout. This user interface displays the charge account as separate segments, in separate fields. If this profile is set to Yes, then the separate segments are displayed. If No, then the new user interface, which displays the segments in a single field, is used. <i>Default Value:</i> No, at the Site level
POR: Distribution Lines Region	-	OBSOLETE

Profile Option Name	Level	Profile Option Description
POR: Dtd Files Directory (Optional)	Site	Dtd files absolute directory. For example. oracle_stuff/ XML/orc115. <i>Default Value:</i> No default
POR: Ecmanager Servlet Path	-	For internal use by Oracle only.
POR : Edit Accounts Region	-	OBSOLETE
POR: Enable Automatic Debit Memo Creation for Returns (Optional)	Site Application Responsibility User	Enables automatic creation of debit memos for all return-to- supplier transactions. Valid values are Yes or No. <i>Default Value:</i> No
POR : Emergency Requisitions - Restrict to Requisition Templates	-	OBSOLETE
POR: Enable Advanced Search and Category Browse (Optional)	Site Responsibility User	Set this profile option if you are not using the local catalog, but are implementing only punchout or transparent punchout catalogs. (See Types of Catalogs, page 4- 2 .) Punchout and transparent punchout catalogs do not use the advanced searching or category browsing features; only the local catalog uses these. Therefore, if you are implementing only punchout or transparent punchout catalogs, you can set this profile option to <i>No</i> to hide all Advanced Search links and to disable the browse categories feature. Set this profile option to <i>Yes</i> to enable advanced searching and category browsing. If this profile option is set to <i>No</i> , requesters can still use standard searching, which includes searching of punchout and transparent punchout catalogs; only the advanced searching and category browsing features are disabled. <i>Default Value:</i> No default (If this profile option is blank, Oracle iProcurement assumes the value is Yes.)

Profile Option Name	Level	Profile Option Description
POR: Enable Check Funds (Optional)	Site Responsibility User	<p>This profile can be used to control if the funds check is initiated as part of the requisition submission process. Valid values are; <i>Display error on failure, Display warning on failure, and No checkfunds</i>. <i>No checkfunds</i> means that the funds are checked during approval, not creation.</p> <p><i>Default Value: No checkfunds</i></p>
POR: Enable Req Distribution Customization (Optional)	Site Responsibility User	<p>This profile is used to control if the distribution-related customization procedures need to be invoked as part of the requisition creation. Valid values are Yes or No.</p> <p>Note: You must customize these procedures prior to setting this profile option to Yes.</p> <p><i>Default Value: No default</i></p>
POR: Enable Req Header Customization (Optional)	Site Application Responsibility	<p>This profile is used to control if the header-related customization procedures need to be invoked as part of the requisition creation. Valid values are Yes or No.</p> <p>Note: You must customize these procedures prior to setting this profile option to Yes.</p> <p><i>Default Value: No default</i></p>
POR : Enable Requisition Line Customization (Optional)	Site Application Responsibility	<p>This profile is used to control if the line-related customization procedures need to be invoked as part of the requisition creation. Valid values are Yes and No.</p> <p>Note: If you did not create customized procedures for requisition lines, then set this profile option to No.</p> <p><i>Default Value: Yes</i></p>

Profile Option Name	Level	Profile Option Description
POR: Extract BPA/Quote Images (Optional)	Site Application Responsibility User	If items on blanket purchase agreements or catalog quotations are associated with image files or image URLs, you can choose whether to extract the images along with the items into the Oracle iProcurement catalog. Requesters can then see the item's image to help them make their purchase. Set this profile option to <i>Yes</i> if you want to extract the images along with the items. See <i>Managing Images</i> , page 4-36. <i>Default Value:</i> Yes
POR: Generate and Display Account at Checkout (Optional)	Site Application Responsibility User	Setting this profile option to <i>Yes</i> means that the charge account will be generated and displayed on the first checkout page. <i>Default Value:</i> No, at the Site level
POR : Goods Line Type (Optional)	Site	Indicates the line type that should be used for all uploaded items and quantity-based non-catalog requests. The value selected here should be distinct from the values selected for POR: Amount Based Services Line Type and POR: Rate Based Services Line Type. You can select only line types with a Purchase Basis of Goods and a Value Basis of Quantity for this profile option. <i>Default Value:</i> No default
POR: Help Path (Optional)	Site Responsibility	For multi-org environments, this is the directory where operating unit-specific purchasing news is stored. Normally, this value is /<OU>/ where OU refers to the name of the operating unit, for example, /Vision Operations/. <i>Default Value:</i> No default

Profile Option Name	Level	Profile Option Description
POR: Hosted Images Directory (Optional)	Site Application Responsibility User	Specifies the directory where image files are stored. If you want to associate an item with a picture, the image file must be copied to this directory to appear in Oracle iProcurement. This path usually corresponds to the /OA_MEDIA/ directory. <i>Default Value:</i> No default
POR: ITEMS DISPLAY NUM	-	OBSOLETE
POR: Java Virtual Path	-	OBSOLETE
POR:Load Auto Attrib (Optional)	Site	Controls whether the catalog loader should automatically create any new local descriptors (also known as category attributes) encountered in a catalog file. Local descriptors are used to describe items in a specific category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Valid values are Yes and No. <i>Default Value:</i> No
POR: Load Auto Category (Optional)	Site	Controls whether the catalog loader should automatically create any new categories encountered in an upload file. Valid values are Yes and No. <i>Default Value:</i> No
POR:Load Auto Root (Optional)	Site	Controls whether the catalog loader should automatically create any new base descriptors (also known as root descriptors) defined in an XML, cXML, or Catalog Interchange Format (CIF) file. Base descriptors are attributes, such as Supplier, that apply to all items and services in the catalog. Valid values are Yes and No. <i>Default Value:</i> No
POR: Multiple Accounts region	-	OBSOLETE

Profile Option Name	Level	Profile Option Description
POR: One Time Location (Optional)	Site Responsibility User	Enter the location to be used as the one-time address. The application uses the location code entered here as the one-time location. The actual one-time address details are entered during checkout. <i>Default Value:</i> No default
POR: Override Supplier P-Card (Optional)	Site Responsibility User	Controls whether the supplier P-Card takes precedence over the employee P-Card when both P-Card types are eligible to be assigned to a requisition line. Valid values are Yes or No. <i>Default Value:</i> No
POR: Parallel Routing Allowed (Optional)	Site User	Determines whether parallel routing is supported. Valid values are Yes or No. <i>Default Value:</i> No
POR : Proxy Server Name (Optional)	Site	Used for punchout and transparent punchout catalogs. It specifies the proxy server (Web Server) name if your Oracle iProcurement implementation has a proxy setup. The proxy server is typically the same as the proxy server that is set up in people's browsers in your company—for example, www-proxy.company.com. For more information, see the <i>Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout</i> . Any time you change this profile option, you must restart the Oracle Internet Application Server (iAS) for the change to take effect. <i>Default Value:</i> No default

Profile Option Name	Level	Profile Option Description
POR : Proxy Server Port (Optional)	Site	<p>Used for punchout and transparent punchout catalogs. It specifies the port on which the proxy server listens if your Oracle iProcurement implementation has a proxy setup. The port is typically the same as the port that is set up in people's browsers in your company—for example, 80. For more information, see the <i>Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout</i>.</p> <p>Any time you change this profile option, you must restart the Oracle Internet Application Server (iAS) for the change to take effect.</p> <p><i>Default Value:</i> No default</p>
POR: Purge Jobs Older Than (days) (Optional)	Site	<p>Catalog administrators can use this profile option to specify the number of days catalog loader job history is stored in the database. This setting helps minimize the amount of disk space used by the loader tables. When the catalog loader is started, it retrieves this profile option setting and purges any data older than the value in the profile option.</p> <p>The tables from which the data is purged include: ICX_POR_BATCH_JOBS, ICX_POR_FAILED_LINE_MESSAGES, ICX_POR_FAILED_LINES, and ICX_POR_CONTRACT_REFERENCES. You can also use the POR: Bulk Loader/Extractor Commit Size profile option to determine how many records are purged at a time.</p> <p><i>Default Value:</i> 30</p>

Profile Option Name	Level	Profile Option Description
POR : Rate Based Services Line Type (Optional)	Site	<p>Specifies the line type for rate-based non-catalog requests. A rate-based request is expressed as a monetary charge per time period.</p> <p>The value selected here should be distinct from the values selected for POR: Goods Line Type and POR: Amount Based Services Line Type.</p> <p>You can select only line types with a Purchase Basis of Goods and a Value Basis of Quantity for this profile option.</p> <p><i>Default Value:</i> No default</p>
POR: Require Blind Receiving (Optional)	Site Application Responsibility User	<p>This profile is used to turn on or off blind receiving support in Oracle iProcurement. Blind receiving support requires corresponding setup in Oracle Purchasing. Valid values are Yes or No.</p> <p><i>Default Value:</i> No</p>
POR: ROWS DISPLAY NUM	-	OBSOLETE

Profile Option Name	Level	Profile Option Description
POR: Search Governor Value (Optional)	Site	<p>This profile option controls the number of search results requesters can sort and filter. If the number of search results is greater than the value specified in this profile option, requesters cannot sort or filter the results. A message displays to the requester prompting the requester to use additional search criteria to narrow their results before sorting or filtering.</p> <p>This profile option affects only sorting and filtering. It does not determine the number of search results in general. It also does not affect relevance sorting in the local catalog.</p> <p>Note: The higher the search governor value, the slower the search performance in general. Use careful judgment before increasing the value.</p> <p>This profile option does not apply to transparent punchout search results, only to local search results.</p> <p><i>Default Value:</i> 2500</p>
POR: Select Internal Requisition for Confirm Receipts (Optional)	Site	<p>If set to <i>Yes</i>, internal requisitions will be included in the confirm receipt notifications sent to the requester. If set to <i>No</i>, internal requisitions will not be included with the confirm receipt notifications sent to the requester.</p> <p><i>Default Value:</i> Yes</p>
POR: Select Inventory Replenishment Lines for Confirm Receipts (Optional)	Site	<p>Set this profile option to <i>Yes</i> if you want the Confirm Receipts Workflow process to select purchase order shipments with a destination type of Inventory in addition to purchase order shipments with a destination type of Expense.</p> <p><i>Default Value:</i> Yes</p>

Profile Option Name	Level	Profile Option Description
POR: Servlet Virtual Path (Optional)	Site	<p>The virtual path to the Oracle Applications servlet zone. For 11<i>i</i>, this should be set to <i>oa_servlets</i>.</p> <p><i>Default Value:</i> oa_servlets</p>
POR: Set Debug Catalog Loader ON (Optional)	Site	<p>Set this profile option to <i>Yes</i> or <i>Yes with Detail</i> when you want to record debug messages in the log file while uploading a catalog file—for example, if you are experiencing problems with the loader or trying the loader for the first time. These messages can be viewed in the Log screen in the Requests window. (See Viewing the Log File, page 4-19.) As soon as you are finished debugging the problem, set this profile option back to <i>No</i>, to minimize performance issues. The options are as follows:</p> <p>No: The loader records informational messages, including parameters selected on the Specify Options page before loading, and information that the job has started, that it is beginning the index rebuild, and so on.</p> <p>Yes: In addition to informational messages, the loader records debug messages that can help identify problems.</p> <p>Yes with Detail: In addition to informational and debug messages, the loader records line-level debug messages. If you need to generate SQL trace information to track loader performance issues, choose <i>Yes with Detail</i>.</p> <p><i>Default Value:</i> No</p>

Profile Option Name	Level	Profile Option Description
POR: Show Thumbnail Images (Optional)	Site Application Responsibility User	<p>Set this profile option to control whether thumbnail images loaded to the local catalog display on the Search Results Summary and Search Results pages. For example, if you want to wait until all thumbnail images are loaded before displaying them or if you encounter issues, you can set this profile option to <i>No</i> to hide all thumbnail images. Set this profile option to <i>Yes</i> to display all thumbnail images.</p> <p>This profile option sets the default, but requesters can also choose whether to display thumbnail images using their iProcurement Preferences. For example, if this profile option is set to <i>No</i>, a requester can choose <i>Yes</i> to display them for himself.</p> <p>Note: The purpose of this profile option is to temporarily show or hide thumbnail images. This profile option does not control whether thumbnail images display on the Compare Item page. To hide thumbnails from the Compare Item page or to completely hide thumbnails from all pages, use schema editing available in the eContent Manager.</p> <p>See <i>Managing Images</i>, page 4-36.</p> <p><i>Default Value:</i> Yes</p>

Profile Option Name	Level	Profile Option Description
POR: Sort by Relevance (Optional)	Site	<p>Set this profile option to <i>Yes</i> if you want to always display search results sorted by relevance. Relevance is a calculation that ranks search results based on how closely the results match the search criteria, and displays the most closely matching items first. If you set this profile option to <i>No</i>, the search results are not automatically ranked by relevance; however, the requester can still select a Sort by Relevance option to perform relevance ranking on specific search results if desired.</p> <p>Note: When search results are large, setting this profile option to <i>Yes</i> may slow down the search performance. Use careful judgment before enabling sort by relevance as the automatic behavior.</p> <p>Relevance sorting is used by standard, expanded, and advanced search results. It is not used by transparent punchout search results.</p> <p><i>Default Value:</i> No</p>
POR: SSP VERSION (Required)	Site	<p>Indicates the version of Oracle iProcurement that is installed. This profile option should always be set to 5.</p> <p><i>Default Value:</i> 5</p>
POR: SSP4 Installed (Required)	Site	<p>This profile option should always be set to <i>Yes</i>.</p> <p><i>Default Value:</i> Yes</p>
POR: Support review for Express Receive (Optional)	Site Responsibility User	<p>When this profile is set to <i>Yes</i>, the Review and Submit page will be shown during express receiving. Otherwise, the requester will be directed to the Confirmation page directly.</p> <p><i>Default Value:</i> Yes</p>
POR : System Approvers are Mandatory (Optional)	Site User	<p>Determines whether or not the default approvers on the approver list are mandatory.</p> <p><i>Default Value:</i> Yes</p>

Profile Option Name	Level	Profile Option Description
POR: Thumbnail Height (Optional)	Site Application Responsibility User	<p>Set this profile option if you are uploading items to the local catalog and you want to specify thumbnail images for the items. Thumbnail images appear on the Search Results Summary, Search Results, and Compare Items pages. Use this profile option to specify the height, in number of pixels, for all thumbnail images. Use this profile option when the size of the source file needs to be adjusted for thumbnail images. (It is recommended that you set <i>either</i> this or the POR: Thumbnail Width profile option rather than both profile options, to avoid fixed sizing. See Managing Images, page 4-36.)</p> <p><i>Default Value:</i> No default</p>
POR: Thumbnail Width (Optional)	Site Application Responsibility User	<p>Set this profile option if you are uploading items to the local catalog and you want to specify thumbnail images for the items. Thumbnail images appear on the Search Results Summary, Search Results, and Compare Items pages. Use this profile option to specify the width, in number of pixels, for all thumbnail images. Use this profile option when the size of the source file needs to be adjusted for thumbnail images. (It is recommended that you set <i>either</i> this or the POR: Thumbnail Height profile option rather than both profile options, to avoid fixed sizing. See Managing Images, page 4-36.)</p> <p><i>Default Value:</i> No default</p>

Profile Option Name	Level	Profile Option Description
POR: Transparent Punchout Timeout Limit (Optional)	Site Application Responsibility User	<p>Set this profile option if you are setting up a transparent punchout catalog. (See Types of Catalogs, page 4- 2 .) Enter the time, in seconds, after which you want transparent punchout catalogs to time out if the search takes longer than this time to complete. For example, if you enter 30 and a transparent punchout catalog takes longer than 30 seconds to return results, Oracle iProcurement displays a message after 30 seconds that the Web site is not responding. The timeout does not affect other catalog search results if other catalogs are in the store. It affects only the transparent punchout catalog or catalogs in the store that take longer than this timeout to return results. If the profile option is left blank, Oracle iProcurement assumes a timeout of 60 seconds.</p> <p><i>Default Value:</i> 60</p>
POR: Use Oracle Approvals Manager	-	<p>OBSOLETE (The requisition approval workflow can determine whether AME approvals have been set up.)</p>
POR : Use Sequence for Requisition Numbering (Optional)	Site	<p>Use this profile option to indicate whether requisitions created in Oracle iProcurement should follow the same numbering schema as Oracle Purchasing, or if requisition numbers should be generated using the database sequence, which may provide an increase in performance.</p> <p>Note that if this profile option is set to <i>Yes</i>, requisition numbers will be shared across operating units.</p> <p><i>Default Value:</i> No</p>

Profile Option Name	Level	Profile Option Description
TAX: Allow Override of Tax Code (Optional)	Site Application Responsibility User	This profile controls the ability to modify the tax code that can be defaulted during the requisitioning process. When set to No, the tax code field cannot be overridden, nor can the list of tax codes be accessed. <i>Default Value:</i> No default
TAX: Allow Override of Tax Recovery Rate (Optional)	Site Application Responsibility User	This profile controls the ability to modify the tax recovery rate that can be defaulted during the requisitioning process. <i>Default Value:</i> No default

Profile Options Set by Users

The following table lists profile options specific to the requester. These values are set when requesters define their iProcurement Preferences in Oracle iProcurement.

Profile Options Set From iProcurement Preferences

Profile Option	Description
POR: Catalog Result Set Size	Determines how many items display on the Search Results page before requesters need to click Next. The maximum number is 25. <i>Default Value:</i> 7
POR: My Favorite Store	Do not use the System Profiles window to change this profile option. Let requesters choose their favorite store in their iProcurement preferences. <i>Default Value:</i> -1. This default value means that Oracle iProcurement displays the system-assigned store as the favorite store. The system-assigned store is the store that the user has access to (see Defining Realms, page 4-44) that has the lowest sequence number. (When the catalog administrator create stores, he can also sequence them.)
POR : Preference - Display Transaction Currency	OBSOLETE (System administrators can now use Oracle Applications Frame personalization to show or hide transaction currency.)
POR: Preferences - Award	Enable requesters to set their preferred award ID. <i>Default Value:</i> No default

Profile Option	Description
POR : Preferences - Deliver to Location	Enables requesters to set their preferred deliver-to location. <i>Default Value:</i> No default
POR : Preferences - Expenditure Item Date Offset	Enables requesters to set their expenditure item date offset for project-related requisitions. This is the number of days after the order date that the expenditure item date defaults to during checkout. <i>Default Value:</i> No default
POR : Preferences - Expenditure Org	Enables requesters to set their expenditure organization for project-related requisitions. <i>Default Value:</i> No default
POR : Preferences - Expenditure Type	Enables requesters to set their expenditure type for project-related requisitions. <i>Default Value:</i>
POR : Preferences - Project	Enables requesters to set their project number for project related requisitions. <i>Default Value:</i> No default
POR : Preferences - Requester	Enables requesters to set a default requester. <i>Default Value:</i> No default
POR : Preferences - Selected Items Default to Inventory	Enables requesters to indicate whether ordered items are to replenish inventory. <i>Default Value:</i> No default
POR : Preferences - SubInventory	If items are to replenish inventory, requesters can select a default subinventory for those items. This is only valid if the POR: Preferences - Inventory Replenishment profile is set to Yes. <i>Default Value:</i> No default
POR : Preferences - Task	Requesters can set their task number for project related requisitions. <i>Default Value:</i> No default
POR: Result Set Size	Requesters can indicate how many records per page they wish to see when viewing search results on the Receiving and Requisitions pages. <i>Default Value:</i> 10

Profile Options Set for Oracle Services Procurement

The following table lists profile options that are used only by Oracle Services Procurement. See Oracle Services Procurement, page 5-70.

Profile Options for Oracle Services Procurement

Profile Option Name	Level	Profile Option Description
PO: Amount Billed Threshold Percentage (Optional)	Site	Indicates a percentage of the budget amount. The requester receives a notification when this percentage of the budget is billed, for rate-based temporary labor lines. <i>Default value:</i> No default
PO: Contractor Assignment Completion Warning Delay (Optional)	Site	Indicates the number of days before contractor assignment must be completed. The requester receives a notification when the assignment is about to expire in this set number of days. <i>Default value:</i> No default
PO: Enable Services Procurement (Required)	Site	When set to Yes, the Contractor Request links and tabs display the contractor entry information. When set to No, clicking these links and tabs displays the message: <i>You cannot access this page because Oracle Services Procurement is not enabled. Contact your system administrator for help.</i> <i>Default Value:</i> No
PO: UOM Class for Temp Labor Services (Required)	Site	Indicates the unit of measure class that is applicable for temporary labor line types. <i>Default value:</i> No default

Profile Option Name	Level	Profile Option Description
POR: Contractor Expense Line Type (Optional)	Site Application Responsibility	Specifies the line type that will be used for expenses on contractor requests. Only line types with a purchase basis of Services and a value basis of Fixed Price are eligible to be selected. <i>Default Value:</i> Fixed Price Services (This is one of the default line types that Oracle Services Procurement provides.)
POR: Reapproval after Contractor Assignment (Optional)	Site	Some contractor requests require contractor assignment after the requisition is created; others do not. (See the Oracle iProcurement online Help for details.) This profile option determines whether reapproval of the requisition is required after contractor assignment. Select Always to always require approval. Conditionally Required means that reapproval is required only if a change has been made that triggers reapproval - for example, at least one line amount has changed, or the requester modified the unit price, quantity, unit of measure, account, distribution, or project information on the requisition during the checkout that follows contractor assignment. If the new line amount is below the requester's approval limit, then only the requester's reapproval (no additional approval) is required. <i>Default Value:</i> Always

Technology Stack Upgrade

All components in Oracle iProcurement have been migrated to Oracle Applications Framework to take advantage of the new metadata model, advanced user interface interactivity, and personalization features.

The impact of this upgrade is that Oracle iProcurement no longer uses the AK Developer technology for customization. That process is made easier for the system administrator and the requester using the new framework.

For more information, see [Personalize Oracle iProcurement Using Oracle Applications Framework](#), page 2-18.

Document Sourcing Setup

This chapter provides an overview of the document sourcing options in Oracle iProcurement. It also includes instructions for setting up contract purchase agreements as source documents.

This chapter covers the following topics:

- Overview
- Contract Purchase Agreement Sourcing
- Setting Up Contract Sourcing

Overview

You can set up Oracle iProcurement to reference the following source documents for items or services:

- Blanket purchase agreements (global or local)
- Quotations
- Contract purchase agreements (global or local)

For information on extracting blanket purchase agreements and quotations, see *Extracting Catalog Data from Oracle Purchasing*, page 4-12. For example, if a requester orders an item that was extracted on a blanket purchase agreement, then Oracle Purchasing (using the PO Create Documents workflow) automatically creates a release against the blanket purchase agreement. You can also extract approved supplier list (ASL) entries, which may contain source documents.

Source Document Number in Cart (If Displayed)

Shopping Cart

[Save](#) [Checkout](#)

Line	Item Description	Special Info	Unit	Quantity	Price	Amount (USD)	Delete	Source Document Number
1	Console Interface	Multiple	Each	1	150.00 USD	150.00		
2	Mobile phone - expensable asset (tracked in ASSETS as an EXPENSED asset)		Each	1	490.00 USD	490.00		12341
Total						640.00		

I need a purchase order number immediately

TIP Purchase Order number will be assigned after completing checkout.

[Return to Shopping](#)

[Save](#) [Checkout](#)

The figure above shows how an item that is sourced to a document carries that association in the shopping cart. (By default, the source document number does not display in the shopping cart, but you could display it using Oracle Applications Framework personalization. The association occurs whether or not you display the field to requesters.)

Oracle iProcurement also supports global agreements (both global blanket and global contract agreements). As long as the global agreements are enabled in the requester's operating unit, the requester can order items from these agreements even if the agreements were created in another operating unit. Even if the Purchasing Site on the global agreement is not valid in the requester's operating unit, it still displays (for example, in the search results, for an extracted global blanket agreement). Requesters can also track the resulting purchase order, even if it was created in another operating unit, and receive the items. For more information on setting up and creating global agreements, see the *Oracle Purchasing User's Guide*.

Even if you do not extract blanket purchase agreements and quotations, sourcing can still occur in Oracle Purchasing, if set up. See the *Oracle Purchasing User's Guide* for details.

This chapter focuses on sourcing to contract purchase agreements in Oracle iProcurement.

Contract Purchase Agreement Sourcing

Oracle iProcurement supports the association of a requisition line with a contract purchase agreement defined in Oracle Purchasing. This allows the automatic creation of standard purchase orders through the use of the PO Create Documents workflow. The standard purchase order that is created stores the contract number in the Purchase Orders window, in the Reference Documents tabbed region, in the Contract field. Oracle Purchasing adds the total amount of the purchase order line to the Released amount on the contract purchase agreement.

Associating a requisition line with a contract purchase agreement can be done in two basic ways, automatic or explicit.

Automatic Contract Sourcing

If the PO Create Documents workflow option "Should Contract be used to autocreate the Doc?" is set to Yes, Oracle Purchasing checks whether there is a valid contract purchase agreement for the supplier and supplier site specified on the requisition when creating the purchase order. If there is, that contract is used. If multiple contracts exist for the supplier and supplier site, the latest created contract is used.

Automatic contract sourcing can be used for the following types of items:

- Uploaded, punchout, or transparent punchout catalog items where there exists a valid contract purchase agreement for the same supplier* associated with the item.
- Non-catalog requested items where there exists a valid contract purchase agreement for the same supplier* associated with the item.
- Extracted ASLs where there exists a valid contract purchase agreement for the supplier* specified on the ASL.

* If a supplier site is given, then the application will prefer a contract with that site. Otherwise, only the supplier has to match; the application will choose the latest-created contract with the same currency and use the supplier site from the contract.

Automatic sourcing can be set up to occur during requisition creation in Oracle iProcurement, or later during purchase order creation in Oracle Purchasing. See Setting Up Contract Sourcing, page 3- 4 .

Explicit Contract Sourcing

You can also explicitly enter a contract purchase agreement for an item in the catalog.

Explicit contract auto-sourcing can be used for the following types of items:

- Uploaded items that have an explicit reference to a contract purchase agreement in Oracle Purchasing.
- Extracted ASLs that are linked directly to a contract purchase agreement.
- XML punchout or transparent punchout items for which the supplier hosting the content has specified a contract purchase agreement number that is valid in Oracle Purchasing.
- XML punchout or transparent punchout items from an Oracle Exchange marketplace where the buying company has specified on a supplier price list a valid contract purchase agreement number in Oracle Purchasing.

If a specific, valid contract purchase agreement number is given for an item, the PO Create Documents workflow references that contract purchase agreement on the purchase order, even if other valid contract purchase agreements exist for the supplier.

The contract number for an item (when the contract reference is made explicitly) displays as shown in the following illustration, if the Contract Number descriptor remains at its default setting of Search Results Visible:

Contract Number in Item Details

Supplier	CE Office Supply
Supplier Site	
Supplier Item	CRO08521
Internal Item Number	
Manufacturer Item	CRO8521
Manufacturer	BIC
Unit	EA
Unit Price	400
Currency	JPY
Contract Number	852
Long Description	Cross refills for Selectip Rollerball pens.
Category Name	Cartridge Pen Ink Refills
Ink Color	Blue
Model	21
Point Style	Fine

When explicitly specifying a contract purchase agreement number for an item, the number stays with the item even when the item is added to the favorites list; copied, changed, or resubmitted on a requisition; or saved in the shopping cart. If, however, the contract is no longer valid at that point, then Oracle iProcurement drops the contract reference. For example, the requester copies a requisition with a contract reference that is no longer valid. When copying the requisition to the shopping cart, Oracle iProcurement checks whether the contract is still valid. If it is not, Oracle iProcurement keeps the item in the shopping cart, but removes the association with the contract.

Setting Up Contract Sourcing

The following information applies to both global and non-global contract agreements.

Setup Steps

Setting Up Automatic Contract Sourcing:

You can set up contract sourcing to occur during requisition creation, as soon as the item is added to the cart, or later during purchase order creation. Typically, you would set up contract sourcing to occur during requisition creation if the following were true:

- You have implemented Oracle Advanced Pricing, which is used by items that reference contract agreements. In this case, you typically want the advanced pricing rules to apply to the item's price as soon as the requester orders it. (If you do not set up contract sourcing to occur during requisition creation, the advanced pricing still occurs, but during purchase order creation. Therefore, the requisition may have a different price than the purchase order.)
- You want the contract agreement reference to travel with the requisition line, so that it will be used later if the requester copies or changes the requisition later (if the contract is still valid). You may have a business process that requires a contract to be applied specifically to the requisition line, rather than applying contract sourcing during purchase order creation.

Note: When you set up automatic contract sourcing to occur during requisition creation, requesters do not see the contract reference in the search results (for extracted items or ASLs). The contract reference does not appear until the item is added to the cart.

See the *Oracle Purchasing User's Guide* for complete information on sourcing that occurs on requisitions.

Perform contract sourcing during requisition creation

1. Create contract purchase agreements in Oracle Purchasing.
See the *Oracle Purchasing User's Guide*.
2. Set the Use Contract Agreements for Auto Sourcing option in the Document Types window in Oracle Purchasing:
 - Navigate to the Document Types window in Oracle Purchasing as follows: Setup > Purchasing > Document Types.
 - Select the Purchase Requisition document type.

- In the Document Types window, select the option Use Contract Agreements for Auto Sourcing.
- If desired, select the sub-option Include Non-Catalog Requests if you want to apply contract agreement sourcing to non-catalog requests as well as goods and services requisitions.

Note: Oracle iProcurement also checks the profile option PO: Automatic Document Sourcing if you are applying contract agreement sourcing during requisition creation:

- If the profile option is set to No, then you must set up an ASL entry that references a global contract agreement, and run the extractor.
- If the profile is set to Yes, then you do not have to set up an ASL. (The profile applies the latest matching contract agreement in the system to the item. See the *Oracle Purchasing User's Guide* for details.)

3. Use the Oracle Workflow Builder to open the PO Create Documents workflow and set the attribute "Should Contract be used to autcreate the Doc?" to Yes, if you want the resulting purchase order with the contract reference to be created automatically.
 - If this attribute is set to Yes, then the workflow automatically creates the purchase order with the reference to the contract agreement.
 - If this attribute is set to No, then the contract agreement reference stays with the requisition line; however, because workflow cannot create the purchase order from the contract, the requisition line is placed into the AutoCreate window for the buyer to manually create the purchase order (with the contract reference already on the requisition line).

Perform contract sourcing during purchase order creation

If you do not want contract agreement sourcing to occur until purchase order creation, then do not select the Use Contract Agreements for Auto Sourcing option for requisitions in the Document Types window. Instead, use the "Should Contract be used to autcreate the Doc?" attribute to determine whether a contract is used to automatically create the purchase order.

See the PO Create Documents section in *Customize Workflows*, page 2-22, for more information. See also the *Oracle Workflow Guide* and the *Oracle Purchasing User's Guide* for more guidance.

Setting Up Explicit Contract Sourcing:

This section discusses how you can use the catalog loader, punchout, or transparent punchout to explicitly associate an item with a specific contract purchase agreement.

Using the catalog loader to associate items with contract purchase agreements

When uploading a catalog file, specify the operating unit(s) and contract purchase agreement(s):

- For XML and tab-delimited text files, specify the operating units and contract purchase agreement numbers at the header level of the file. Alternatively, you

can select a valid operating unit and contract number from drop-down menus on the **Specify Options** page just before submitting the file.

- For CIF and cXML files, select a valid operating unit and contract number from the drop-down menus on the **Specify Options** page just before submitting the file.

Associating Contracts with Catalog Load Files Using the Specify Options Page

ORACLE® eContent Manager Home Logout Preferences Help

▶ Load Data and Schema
▶ Manage Content
▶ Download From Exchange
▶ Online Schema Maintenance

Specify Options: ItemPrice.txt

These optional fields apply to all items in the file. Cancel! Upload

Supplier	<input type="text"/>	
Operating Unit	<input type="text"/>	
		<small>Selecting All Operating Units makes your file available to all users.</small>
Supplier Site	<input type="text"/>	
		<small>Supplier and Operating unit must be selected.</small>
Contract Purchase Agreement	<input type="text"/>	
Negotiated Prices	<input type="text" value="Yes"/>	

Apply Category Mapping?

Do you want to map the categories in this file to Oracle Purchasing Categories?

Yes
 No, use the values from the file

Cancel! Upload

All items in the catalog file are associated with the referenced contract purchase agreement(s).

Note: It may be necessary to split the data file into multiple files if some of the items should be associated with different contracts.

For more information on the use of the catalog loader, including sample XML and text files, see the appendices later in this guide.

Associating punchout and transparent punchout items with contract purchase agreements

In a punchout or in a transparent punchout to the supplier, the supplier can specify a contract number along with the item information. In a punchout or transparent punchout to an Oracle Exchange marketplace, the buyer can specify the contract number on a price list on the Exchange. Oracle iProcurement recognizes contract numbers only in an XML (not cXML) punchout.

For more information on specifying contract purchase agreements for punchout and transparent punchout items, see the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*.

Profile Options

POR: Default Currency Conversion Rate Type is used to perform currency conversions when automatic contract sourcing is used. See Currency Validation later below.

Function Security

The POR_SSP_ECMANAGER function controls access to the eContent Manager page from which files are uploaded, if you use uploading to specify contract purchase agreements for items. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

Workflow

The PO Create Documents workflow provides different levels of support for contract automation using the following attributes in the poxwfatc.wft workflow file. Use the Oracle Workflow Builder to set these attributes in the poxwfatc.wft file according to your business practices and load the updated workflow file to the database.

- Should Contract be used to autcreate the Doc?
- Is Contract Required on the Req Line?
- Should a Non-Catalog Request AutoSource From the Contract?
- Should temp labor request be autosourced from contracts?

For more information, see the section on the PO Create Documents workflow in *Customize Workflows*, page 2-22.

Implementation Considerations

Notes

The PO: Automatic Document Sourcing profile option and the Use Contract Agreements for Auto Sourcing options work separately from the workflow attributes. The former govern document sourcing during requisition creation; the latter govern document sourcing during purchase order creation. As a result, the following scenarios may occur:

- If PO: Automatic Document Sourcing is set to No, and no ASL exists for the item, the PO Create Documents workflow may still find a contract purchase agreement if the attribute *Should Contract be used to autcreate Doc?* is set to Yes.
- If Use Contract Agreements for Auto Sourcing is not selected, then the PO Create Documents workflow may still find a contract purchase agreement if the attribute *Should Contract be used to autcreate Doc?* is set to Yes.

Validation

The following summarizes the business rules that are enforced when specifying a contract purchase agreement for an item, in either automatic or explicit sourcing.

Supplier Validation

A catalog file that contains contract purchase agreement references can only refer to one supplier, and the contract must be valid for that supplier.

In a punchout or transparent punchout, the contract purchase agreement number must be valid for the supplier. (If a supplier site is given, then the application will prefer a contract with that site. Otherwise, only the supplier has to match; the application will choose the latest-created contract with the same currency and use the supplier site from the contract.)

Contract Purchase Agreement Validation

Only valid contract agreements may be referenced. Valid contracts include:

- Approved agreements
- Agreements that have not expired
- Agreements that have not been canceled
- Agreements that are not on hold
- Agreements that have not been finally closed

Currency Validation

In a catalog file, all prices and all contract purchase agreement references must be in the same currency, and that currency must match the contract purchase agreement currency. Otherwise, the items in the file are rejected during uploading.

In a punchout or transparent punchout where an explicit contract purchase agreement number is given, the item currency must match the contract currency. Otherwise, the purchase order is not created.

In automatic contract sourcing, Oracle iProcurement looks for a matching contract purchase agreement (see Supplier Validation, above) with the same currency.

Operating Unit Validation

The contract purchase agreement must be valid in the operating unit in which the item is requested.

If entering a contract number in a catalog file, only one contract can be specified per operating unit. The contract number must be valid in that operating unit.

Catalog Setup and Management

This chapter provides a complete overview and setup of the Oracle iProcurement catalog.

This chapter covers the following topics:

- Catalogs and Stores
- Catalog Setup Checklist
- Creating and Maintaining Local Content
- Extracting Catalog Data from Oracle Purchasing
- Loading Catalog Data
- Define Category Mapping
- Define Classification and Supplier Domains
- Setting Search Related Options
- Managing Images
- Defining Realms
- Setting Up Non-Catalog Request Templates

Catalogs and Stores

Oracle iProcurement uses stores and catalogs to organize items for requesters, as shown in the figure below. Each store contains one or more catalogs of items (see Types of Catalogs, page 4- 2). When requesters search, Oracle iProcurement searches across all catalogs in the store and displays the results. (You search one store at a time.)

Grouping similar catalogs into a single store provides the following benefits:

- Provides logical groupings. In some cases, requesters may understand store groupings better than categories, which may be too technical or granular for requesters.
- Produces more relevant search results. For example, searching for *battery* can return *AAA battery*, *industrial battery*, and *notebook computer battery*. If, however, each battery is in a separate catalog and you segment the catalogs by store, the notebook computer battery can belong to a Computer Supplies store. Searching for a battery in the Computer Supplies store returns only computer batteries.

Shop Page

The screenshot shows the Oracle iProcurement interface. At the top, there's a navigation bar with 'Shop', 'Requisitions', 'Receiving', and 'Contractors'. Below that, a search bar is set to 'Main Store'. A 'Change My Favorite Store if desired' link is visible. The 'Stores' section lists various catalog types: Main Store, Supplier Marketplace (SAQQARA), Travel, Exchange Marketplace, Legal Services, Transparent Exchange Marketplace, Computers, Office Supplies, and SAQQARA (Transparent Punchout). A 'Shopping Cart' box shows 'Your cart is empty.' Below the stores list is a 'My Requisitions' section with a 'Full List' button and a table header.

In the figure above, the requester selects a store from the drop-down menu next to the search field, or the requester can click a store to see its catalog contents and search it. The store drop-down menu defaults a favorite store. Requesters choose My Favorite Store in their iProcurement Preferences.

Types of Catalogs

Oracle iProcurement supports the following types of catalogs:

- Local catalog (also known as the base catalog)
- Punchout catalog hosted by a supplier or marketplace
- Transparent punchout catalog hosted by a supplier or marketplace
- Informational catalog

Local Catalog

There are two sources for data residing in the local catalog. One of these sources is your internal procurement system. Using the catalog extractor, data from purchasing documents such as blanket purchase agreements and requisition templates, as well as inventory items and approved supplier list (ASL) entries, can be made available to requesters in Oracle iProcurement. The other source for local content is data loaded directly into Oracle iProcurement through the catalog loader. This data may have originated from a supplier or third-party content management service, downloaded from Exchange.Oracle.com, or created internally.

Punchout Catalog Hosted by Supplier or Marketplace

While creating a requisition, requesters can punch out directly to an Oracle Exchange marketplace, such as Exchange.Oracle.com, or to a supplier's Web store (to access supplier-hosted catalogs). After selecting items for purchase, requesters return to Oracle iProcurement to add additional items to their cart and check out as they normally do. For more information on setting up punchout, see the *Oracle Procurement Buyer's Guide to*

Punchout and Transparent Punchout. There is also a supplier version of this guide, *Oracle Procurement Supplier's Guide to Punchout and Transparent Punchout.*

Transparent Punchout Catalog Hosted by Supplier or Marketplace

A transparent punchout catalog (also known as a distributed search) allows requesters to search for items on an external site without leaving Oracle iProcurement. Unlike punchout, requesters do not access the site directly. Instead, when the requester searches for items, the transparent punchout works in the background to access the remote catalog and returns the matching items directly to the search results in Oracle iProcurement. Requesters do not necessarily know the items came from an external site. From the **Search Results** page, requesters add the items returned from the transparent punchout to their shopping cart and check out as they normally do.

From Oracle iProcurement, you can set up a transparent punchout to a supplier site or to an Oracle Exchange marketplace, such as Exchange.Oracle.com. For more information, see the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout.* There is also a supplier version of this guide, *Oracle Procurement Supplier's Guide to Punchout and Transparent Punchout.*

Informational Catalog

An informational catalog enables you to provide to requesters instructions or links for ordering items or services that may not fit into the other catalog types. For example, your company may already have internal Web pages containing purchasing information for employees. You can use the informational catalog as the starting point for accessing those pages. The informational catalog enables Oracle iProcurement to be your company's portal for all ordering.

You can create informational catalogs in the eContent Manager. (Use the iProcurement Catalog Administration responsibility to access the eContent Manager.) For instructions, click the Help icon in the eContent Manager.

Choosing a Catalog Type

Different items and commodities are better suited to one catalog type over another; however, there is no one-size-fits-all solution to catalog management. The following table provides guidance on the commodities best suited to the different catalog types, but ultimately you and the supplier decide on the best approach. You can use one or more catalog types to suit your processes.

Catalog Types Compared

Catalog Type	Commodity (Types of Items)
Local catalog	<p>Best suited for direct material, such as mass-produced mechanical parts; products with prenegotiated or stable prices; items for which blanket agreements and quotations already exist in Oracle Purchasing (which can be extracted to the local catalog); or indirect material that you want to manage locally (rather than using a punchout or transparent punchout) so that you have more control over the pricing and descriptions.</p> <p>Use for items you want to manage locally.</p>
Punchout	<p>Best suited for indirect material requiring a high degree of configuration (such as computer hardware or office furniture) and specialized services (such as printing or media services). For example, the supplier site may have special features unique to the industry that the punchout can use. (In an XML punchout, the supplier can also link its items to contract agreements in Oracle Purchasing.)</p> <p>The supplier controls the content, searching, and the user interface for selecting items.</p>
Transparent punchout	<p>Best suited for products with fluctuating prices, or extremely large or specialized catalogs, such as chemical supplies, that you want the supplier to manage. (The supplier can also link its items to contract agreements in Oracle Purchasing.)</p> <p>The supplier controls the content and the search engine, but the requester never leaves Oracle iProcurement while searching and shopping.</p>
Informational catalog	<p>Best suited to provide requesters with instructions or links for ordering items that are not provided by the other catalog types. Enables Oracle iProcurement to be a portal for all ordering.</p>

Other functional differences between the catalog types include the following:

- For differences in the search features that different catalog types support, see Appendix D.
- Both local and transparent punchout catalogs support item images and item comparisons. (Punchout catalog items are controlled by the supplier, so the ability to view images and comparisons depends on the supplier's site. A punchout to an Oracle Exchange marketplace automatically supports item images, if the supplier provides them, and item comparisons.)
- In a local catalog, the buying company can create additional base and local descriptors by uploading them. (See the appendices later in this guide.) In a

punchout or transparent punchout, the supplier or marketplace provides the minimally required base descriptors.

- A punchout or transparent punchout to an Oracle Exchange marketplace can provide different prices for the same item that are visible only to certain operating units if you perform the multiple organizations setup described in the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*. The local catalog provides even more functionality for creating item information that is unique to an operating unit. (On an Oracle Exchange marketplace, only the item's price, unit of measure, and currency can vary by operating unit. In the local catalog, the entire item can vary; it can exist in some operating units, but not others, or its descriptive information can vary by operating unit.)
- The local catalog allows you to restrict different requesters' access to categories. Punchout, transparent punchout, or informational catalogs allow you to restrict access to them at the catalog level. (See *Defining Realms*, page 4-44.)

Example Stores and Catalogs

In the following example, you create seven catalogs and three stores. An X indicates whether the catalog is included in the store.

The example also shows how you can segment the local catalog by supplier, if desired. Segmenting the local catalog by supplier is helpful if you want to place local catalogs in separate stores as shown in this example.

Note: For instructions on creating and managing multiple catalogs and stores, use the iProcurement Catalog Administration responsibility to access the eContent Manager. Click the Help icon.

Example Catalogs and Stores

Catalog Name	Catalog Type	Store: Computer Supplies	Store: Office Supplies	Store: Wireless Supplies
Approved Computer Supplies	Local (for Computer Supplier, Inc. items only)	X		
Office Supplies	Local (for Office Supplier, Inc. items only)		X	
All Paper Supplies	Transparent punchout		X	
Business Cards	Punchout		X	
Arch Wireless	Punchout			X
AT&T Wireless	Punchout			X
Wireless Services	Informational			X

In this example, when the requester accesses the **Shop** page, all the available stores are displayed. The following figure shows what happens when the requester clicks the Office Supplies store:

Shop Store Page

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Shop [Requisitions](#) [Receiving](#) [Contractors](#)

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#) | [Contractor Request](#)

Search Office Supplies Enter a search term here to perform a standard search [Shop Other Stores](#)

[Shop: Stores](#) >

Shop Office Supplies

Pen, paper

Available Catalogs
Enter keywords in the search field above and press **Go** to search the following available catalogs.

Name	Description	Type
Office Supplies	Pens, clipboards, whiteboards, clips, containers, and other non-paper supplies	Local
Business Cards	Order business cards here	Punchout
All Paper Supplies	Paper, envelopes, etc.	Transparent Punchout

Shopping Cart
Your cart contains 2 lines.

Recently Added Lines

AD-Palm Pilo...	2	Each
CELL PHONE 7...	1	Each

Compare Items
No items selected.

If a URL was specified for a punchout or informational catalog during setup of the catalog, the catalog name appears as a link. (Local or transparent punchout catalog names are never linked.) Requesters can search all three catalogs by entering a search keyword into the Search field, or they can click a catalog link to go to the punchout or informational catalog site.

Operating Unit-Specific Stores

When creating a store, you can also assign the store to all operating units (the default setting) or to specific operating units. A store that is assigned to a specific operating unit is visible and accessible only to requesters in that operating unit. See the instructions on creating stores in the eContent Manager online Help.

Search Results for a Store

If the requester searches a store and the store contains more than one catalog, a **Search Results Summary** page displays, dividing the results among each catalog, as shown in the following figure.

Note: For illustrative purposes, the following figure shows just one search result for the local and transparent punchout catalogs. Oracle iProcurement actually displays the first three search results from each catalog on the **Search Results Summary** page.

Search Results Summary Page

Search Results Summary from Office Supplies: legal

← **Local catalog**
search results

[Hide Images](#)

[View all results from Office Supplies](#)

[Standard Classification Folders, Legal, Blue](#)



Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.

Category: File Folders	Supplier: Acme Supplies	Supplier Item: FDR-0008
Manufacturer: National Supplies	Manufacturer Item:	

Price: **4.95 USD** Unit: **Each**

Quantity [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

Search Results Summary from All Paper Supplies: legal

← **Transparent punchout**
catalog search results

[Hide Images](#)

[View all results from All Paper Supplies](#)

[Hanging Partition Fastener Folders, Ruby Red](#)



Durable 25-point pressboard covers in 4 bright colors. 6 separate filing sections for legal documents and printouts. Sturdy kraft dividers with strong metal fasteners. Tear-resistant Tyvek gussets allow for 2 1/4" expansion. Adjustable tab for easy identification.

Category: File Folders	Supplier: Acme Supplies	Supplier Item: FDR-0007
Manufacturer: National Supplies	Manufacturer Item:	

Price: **5.99 USD** Unit: **Each**


Quantity [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

Search Results Summary from Business Cards: legal

← **Punchout catalog**
search results

[Hide Images](#)

[Business Cards](#)



Order business cards here

The **Search Results Summary** page works as follows for each catalog type:

- A local catalog (such as Office Supplies in the figure above) returns the first three items on the **Search Results Summary** page that match the search. If no matching items are found, a no results found message displays for the local catalog.
- A transparent punchout catalog (such as All Paper Supplies in the figure above) displays the first three matching search results or no results found on the **Search Results Summary** page, just like the local catalog.
- A punchout catalog (such as Business Cards in the figure above) displays a link (and, if you set it up, an image) on the **Search Results Summary** page if the search keywords the requester enters match the keywords defined for the punchout when you set it up.
- An informational catalog displays a link (and, if you set it up, an image) on the **Search Results Summary** page if the keywords match, just like the punchout catalog.

For local and transparent punchout catalogs, a link at the top of each section on the **Search Results Summary** page takes the requester to a detailed **Search Results** page, which lists all of the matching items in that catalog, as shown in the following figure.

Search Results Details Page

Search Main Store [Advanced Search](#) [Shop Other Stores](#)

[Shop Stores](#) >

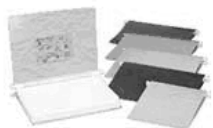
Search Results from Office Supplies: office things

Sort by

Search results filtered by **No active filter.**

[Press Binder](#)

Metal-edge binders on the folders hold papers fast in place




Category	Office Supplies Item Category	Supplier	Office Things	Supplier Site	Seattle
Supplier Item	RLK-123456	Internal Item Number		Contract Number	
Price	0.43 USD	Unit	EA		

Quantity

[Rollerball Pen](#)

Fine-point, rollerball pen with grip, black ink



Category	Office Supplies Item Category	Supplier	Office Things	Supplier Site	Seattle
Supplier Item	RLK-123666	Internal Item Number		Contract Number	
Price	1.89 USD	Unit	EA		

Quantity

Shopping Cart

Your cart contains 2

Recently Added Li

AD-Palm Pilo...
CELL PHONE 7...

Compare Items

No items selected.

Related Links

Categories

[Office Supplies](#)

[More...](#)

Shopping Lists

[Click here to see all shopping lists.](#)

From the **Search Results Summary** or **Search Results** pages, the requester can add the items to the shopping cart.

Controlling Access to Catalogs and Stores

Use any one or more of the following methods if you want to control access to content:

- Use item source realms to control access to punchout or transparent punchout catalogs, by user or responsibility. See *Defining Realms*, page 4-44. See also the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*.
- Use item source realms to control access to informational catalogs, by user or responsibility. See *Defining Realms*, page 4-44.
- Use category realms to control access to categories within any local catalog, by user or responsibility. (You cannot apply category realms to categories within a punchout or transparent punchout catalog.) See *Defining Realms*, page 4-44.
- Display stores, which can contain different types of catalogs, to select operating units. See instructions for managing stores in the eContent Manager online Help.

You can also display non-catalog request templates to select operating units. See *Setting Up Non-Catalog Request Templates*, page 4-52.

Catalog Setup Checklist

Use the following checklist for all setup related to catalog creation and management. This is a checklist of all setup steps in this chapter.

Catalog Setup Checklist

Number	Step	Required or Optional	Information Source
1	Determine Catalog Types to Implement	Required	Types of Catalogs, page 4- 2 Choosing a Catalog Type, page 4- 3
2	Create One or More Catalogs: local catalog, punchout or transparent punchout catalog, or informational catalog	Required	For local catalog, see Creating and Maintaining Local Content, page 4-11. For punchout or transparent punchout, see the <i>Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout</i> . For informational catalogs, use the iProcurement Catalog Administration responsibility to access the eContent Manager; click the Help icon and look for instructions on managing catalogs and stores.
3	Decide Whether to Create More than One Store	Optional	Catalogs and Stores, page 4- 1
4	Create Stores to Group Catalogs	Optional	Use the iProcurement Catalog Administration responsibility to access the eContent Manager. Click the Help icon for instructions on managing catalogs and stores.
5	Define Access to Catalog Content	Optional	Controlling Access to Catalogs and Stores, page 4- 8 Defining Realms, page 4-44

Number	Step	Required or Optional	Information Source
6	Set or Review Search Related Options	Recommended	Setting Search Related Options, page 4-36
7	Associate Images with Catalogs, Stores, or Items	Optional	Managing Images, page 4-36
8	Set Up Non-Catalog Request Templates	Optional	Setting Up Non-Catalog Request Templates, page 4-52

Note: If you have upgraded from Release 11.5.8 or earlier, make sure that you have run the Catalog Index Create - Intermedia process. Use the Purchasing Super User responsibility to access this request. After running it, ensure that you can search for existing catalog data and that the data is accurate. You only need to run this process if you are upgrading from Release 11.5.8 or earlier. The process can only be run once, after which it disappears from the system. Therefore, if you do not see the process, then it likely has already been run. See *About Oracle iProcurement in Oracle Supply Chain Management*, on Oracle *MetaLink*, for details.

Profile Options

It is recommended that you leave POR: My Favorite Store at the default setting of -1 during implementation. When this profile option is set to -1, Oracle iProcurement automatically displays the store that has the lowest sequence number (you set the sequence when defining the store) and that the requester has access to, if you use realms to control catalog access.

For a list of profile options that affect search behavior, see Appendix D.

Note: The requester can change the default favorite store by selecting My Favorite Store in the iProcurement Preferences.

Function Security

None, but you can optionally control access to catalogs or stores. See *Controlling Access to Catalogs and Stores*, page 4-8 .

Workflow

None

Implementation Considerations

Note the following about creating stores:

- Oracle iProcurement provides a default store, called the Main Store, if you do not wish to set up stores.
- Every punchout, transparent punchout, or informational catalog must be assigned to a store to be searchable. The local catalog is already in the Main Store by default, although you can assign it to any store. (If you are upgrading from Release

11.5.8 or sooner, your punchout catalogs, if any, are also automatically included in the Main Store; the upgrade process also creates an additional store to house each punchout. Therefore, after upgrading, existing punchout catalogs are available in both the Main Store and their own individual stores. You can change this configuration if desired. If you are upgrading from 11.5.9, then your existing store and catalog configuration is preserved.)

- A catalog can be in multiple stores.
- The more transparent punchout catalogs in a store, the slower the search performance may be, depending on factors such as network and Internet traffic and the external site's performance.

Note: A store can contain more than one catalog of the same type, such as two punchout catalogs, with one exception: a store can have only one local catalog.

- Category browsing occurs in the local catalog only.
- Advanced Search is performed on the local catalog only. A store that contains a transparent punchout catalog, or that contains only an informational or only a punchout catalog, does not allow Advanced Search.
- If a store contains only punchout catalogs, set at least one of the punchout catalogs to always display in the search results, to prevent the **Search Results Summary** page from being blank when the search returns no matching items. See the online Help in the eContent Manage for instructions on managing stores.

Note: A store that contains only a punchout catalog or only an informational catalog goes directly to that catalog when you click the store's link on the **Shop** home page.

- The default Main Store has no image associated with it. If you want to associate images with stores, see the online Help about stores in the eContent Manager. See also Managing Images, page 4-36.

Creating and Maintaining Local Content

Populating the local catalog with content consists of the following activities. Either extracting or loading data is required; everything else is optional:

- Extracting Catalog Data from Oracle Applications, page 4-12
- Loading Catalog Data, page 4-26
- Define Category Mapping, page 4-29
- Define Classification and Supplier Domains, page 4-34

Perform the following steps to set up a local catalog:

1. Determine the source of data for the local catalog—the extractor, which pulls data from Oracle Purchasing; the catalog loader, which loads the data in files; or both.
2. Analyze your catalog structure. What categories and subcategories do you use? What descriptors, such as manufacturer or ink color, do you use to describe items?

3. Create categories by using the extractor, which pulls categories from Oracle Purchasing; the schema loader or editor in Oracle iProcurement; or both.
 - See *Extracting Catalog Data from Oracle Purchasing*, page 4-12 for instructions on using the extractor.
 - See Appendix C for instructions on uploading schema. See the eContent Manager online Help for instructions on schema online editing.
 - You can also include new categories and descriptors when loading catalog items in step 6, if the POR:Load Auto profile options are set to Yes.

4. If you created new categories using schema loading or editing, you must use the **iProcurement Categories Mapping** page in the eContent Manager to map your categories to categories set up in Oracle Applications. (Alternatively, you can leverage mapping in Oracle e-Commerce Gateway while uploading items in step 6. See *Define Category Mapping*, page 4-29.) All categories must map to Oracle Purchasing categories before requesters can successfully create requisitions. Optionally use the **Oracle Purchasing Categories Mapping** page to "rename" the categories as they are displayed in Oracle iProcurement.

For instructions on using the **iProcurement Categories Mapping** and **Oracle Purchasing Categories Mapping** pages, see the online Help in the eContent Manager.

5. Optionally use the category hierarchy or the schema loader in the eContent Manager to create a hierarchy of categories that requesters can browse when looking for items. (Requesters can still search for items without browsing, if you do not create a hierarchy of categories.)

For instructions, see the online Help in the eContent Manager.

6. Add catalog items to the local catalog using the extractor, loader, or both.
 - See *Extracting Catalog Data from Oracle Purchasing*, page 4-12.
 - See *Loading Catalog Data*, page 4-26.

7. If uploading data, see if you need to perform the following steps:
 - *Define Category Mapping*, page 4-29.
 - *Define Classification and Supplier Domains*, page 4-34.

8. If you want to include images with items, see *Managing Images*, page 4-36.

9. Optionally segment your local catalog by supplier, by creating additional local catalogs, if needed. Be sure your local catalog belongs to a store.

See the online Help in the eContent Manager for instructions on managing catalogs and stores.

10. If you want to control access to certain categories in the local catalog, see *Defining Realms*, page 4-44.

Extracting Catalog Data from Oracle Purchasing

The following purchasing data from Oracle Purchasing can be reflected in the Oracle iProcurement catalog:

- Purchasing categories

- Blanket purchase agreements
- Global blanket agreements
- Catalog quotations
- Requisition templates
- Approved supplier list (ASL) entries
- Items from the item master file, including internally orderable items

For more information on creating these sources of purchasing data, see the *Oracle Purchasing User's Guide*.

Setup Steps

The catalog extractor in Oracle Purchasing is used to populate the Oracle iProcurement catalog with your Oracle Purchasing data. To extract this purchasing data, perform the following setup.

Select Extractor Options:

Before running the catalog extractor, you must specify which data elements you wish to make available in Oracle iProcurement. For example, if your company does not use requisition templates, there is no need to extract them.

1. Set or review the profile options listed in Profile Options, page 4-20.
2. Open the Define Catalog Server Loader Values window using the following navigation path after logging into Oracle Purchasing: Setup > E-Catalog Admin > Loader Values.

Define Catalog Loader Values Window

Classification Data

	Extract	Last Run Date
Categories	<input checked="" type="checkbox"/>	2003/06/17 04:36:59
Template Headers	<input checked="" type="checkbox"/>	2003/06/17 04:36:59
Log Level		2
Commit Size		2500

Extract Classifications

Item Data

	Extract	Last Run Date
Contracts	<input checked="" type="checkbox"/>	2003/06/17 04:39:38
Item Master	<input checked="" type="checkbox"/>	2003/06/17 04:39:38
Template Lines	<input type="checkbox"/>	2003/04/25 15:34:33
Internal Items	<input type="checkbox"/>	2003/03/06 14:16:41
Log Level		2
Commit Size		2500

Extract Items

3. For the Extract Classifications program (Classification Data section), indicate whether to extract purchasing categories and requisition template headers to Oracle iProcurement by selecting the corresponding checkbox. (Requisition templates become public lists in Oracle iProcurement. These are public shopping lists of items available to all requesters in an operating unit.)

Note: Categories must be selected to extract any data in the Extract Items program (Item Data section).

Template Headers must be selected to extract Template Lines in the Extract Items program.

4. The Last Run Dates for both categories and template headers are automatically populated at the conclusion of each Extract Classifications program. This value is used by the catalog extractor to determine the data that has changed between the date and time stamp captured on this window (the last time the program ran) and the date and time of the current extractor run. Normally, there is no need to alter these values. Clearing out the date and time stamp is equivalent to running the catalog extractor for the first time. The longer span of time between the Last Run Date and now (or when running it for the first time), the more data the extractor has to process and the longer it may take to extract the data.
5. Enter a Log Level to determine the level of detail that should be stored in the log file. The following values are supported:

Log Level Settings

Value	Data Captured in Log File
-1	No log file created
1	Fatal errors
2	Fatal errors and data errors
3	Fatal errors, data errors, and item level details
4	Fatal errors, data errors, item level details, and sub-table level information

The recommended value is 2. If, however, items you expected to be extracted were not extracted, run the extractor again for these items, specifying an earlier Last Run Date and time (to be sure you extract the same contents as last time) and setting the Log Level to 3 or 4. At these levels, the log explains why certain items were not extracted.

6. Enter a Commit Size to determine the number of records that are processed before committing the data. This number defaults from the POR: Bulk Loader / Extractor Commit Size profile option and should depend upon your volume of data and database configuration.
7. For the Extract Items program (Item Data section), indicate whether to extract your item master file, requisition template lines, or internal items to Oracle iProcurement by selecting the corresponding checkbox.

Note: Both Template Headers and Template Lines must be selected to extract requisition templates.

Categories must be selected to extract any data in the Extract Items program.

By default, blanket purchase agreements (including global agreements) and quotations are always extracted. These are grouped together in the Contracts option, which is always selected. You do not need to select this option since these documents are always extracted.

Selecting Item Master extracts purchaseable items in the master item file and item-level ASL entries. Selecting Internal Items extracts internally orderable items, which can be placed on internal requisitions if the internal requisitions functionality has been implemented in Oracle Purchasing.

If an item is both purchaseable and internally orderable, it is extracted based on your selection. If you select only Item Master, it is extracted as a strictly purchaseable (external) item. If you select only Internal Items, it is extracted as a strictly internal item. If you select both, it is available as both an internal and external item in the catalog (if POR: Legal Requisition Type is set to BOTH).

8. The Last Run Dates for Contracts, Item Master, Template Lines, and Internal Items behave in the same manner as described earlier.
9. Populate values for the Log Level and Commit Size as described earlier.

10. Save your changes.

11. Define Rollback Segment (Optional)

Use the Concurrent Programs window to define rollback segments for each of the extractor programs:

- Catalog Data Extract - Classifications
- Catalog Data Extract - Items
- Catalog Data Extract - Purge

Rollback segments are used by the database to store the information needed to undo changes when necessary (for example, during a system failure). Defining rollback segments is optional, because the default rollback settings should be adequate. If you choose to define rollback segments, however, get help from your database administrator. Defining rollback segment sizes can affect the successful completion and performance of the extractor.

For more information on managing concurrent programs, see the *Oracle Applications System Administrator's Guide*.

12. Extract the Data

Extract the data in one of two ways:

- Click the Extract buttons in the Define Catalog Server Loader Values window. See *Launching the Catalog Extractor from the Loader Values Window*, later below.
- Use the Submit Requests window. See *Launching the Catalog Extractor from the Submit Request window*, later below.

Managing the Catalog Extractor:

To transfer your purchasing data into the Oracle iProcurement catalog, the catalog extractor must be launched by clicking the Extract buttons or using the Submit Request window. The catalog extractor consists of four concurrent programs:

1. Catalog Data Extract - Classifications

Based on your selections in the Define Catalog Server Loader Values window, this program transfers eligible Oracle Purchasing categories and requisition template headers to the Oracle iProcurement catalog. This program also synchronizes category name changes made in Oracle Purchasing with catalog data in Oracle iProcurement. It also purges inactive categories and requisition template headers. This program concludes with a rebuild of the interMedia index.

Note: Detailed information on the eligibility requirements of categories and template headers can be found in *Extractor Requirements for Purchasing Data*, later below.

2. Catalog Data Extract - Items

This program makes your eligible Oracle Purchasing data available to Oracle iProcurement requesters. The specific purchasing data that is extracted depends on your selections in the Define Catalog Server Loader Values window and can include blanket purchase agreements, global agreements, catalog quotations, master items, internal items, approved supplier lists, and requisition template lines. This

program also purges some data; however, to perform a complete purging, use the Catalog Data Extract - Purge program. The Catalog Data Extract - Items program also rebuilds the interMedia index.

Note: Detailed information on the eligibility requirements of Oracle Purchasing data can be found in Extractor Requirements for Purchasing Data, later below.

3. Catalog Data Extract - Purge

The purge program deletes from the Oracle iProcurement catalog data that is invalid, expired, or deleted in Oracle Applications. Examples included deleted requisition template or quotation lines, and items that are no longer purchaseable. These items are purged from both the catalog and requesters' favorites lists when you run the purge program.

4. Rebuild Catalog Item interMedia Index (only if data corruption or some other exception occurs)

This program indexes the Oracle Purchasing data in Oracle iProcurement so that it can be searched. The indexing works somewhat like a book index, to help find things faster. This program is included in both the extract classifications and extract items programs, but is offered as a separate program for use on an exception basis only (for example, when data corruption occurs).

Note: Other than for exceptions, you should not run this program independently. For example, if you are upgrading Oracle iProcurement or extracting data and the log indicates a database error occurred while the interMedia Index was running, you could run the interMedia Index program independently; however, you should always investigate the error before running the program, to make troubleshooting the problem easier.

The catalog extractor can be launched from either the Define Catalog Loader Values window or the Submit Request window. The recommended order for running the catalog extractor is:

- Catalog Data Extract - Classifications
- Catalog Data Extract - Items
- Catalog Data Extract - Purge (Recommended)

For more information on creating a report set to run the Extract and Purge programs in the recommended order or to schedule them to run at a specified time, see the *Oracle Applications System Administrator's Guide*.

Launching the Catalog Extractor from the Loader Values Window:

To launch the catalog extractor from the Define Catalog Server Loader Values window:

1. Follow the instructions in the Select Extractor Options steps earlier above to select the data you want to extract and other extractor options.
2. Click Extract Classifications.
3. Monitor the extraction request in Oracle Purchasing by choosing Requests. Choose View Log to check for errors. See Viewing the Log File, later below.

4. Once the classifications request completes successfully, return to the Define Catalog Server Loader Values window and click Extract Items.
5. Monitor the extraction request in Oracle Purchasing by choosing Requests.
Choose View Log to check for errors. See Viewing the Log File, later below.

Launching the Catalog Extractor from the Submit Request Window:

Instead of launching the catalog extractor from the Define Catalog Server Loader Values window, you can launch the extractor from the Submit Request window. The Submit Request window runs the extractor with the options selected and saved in the Define Catalog Loader Server Values window.

To extract classifications and items:

1. Open the Submit Request window using the following navigation path after logging into Oracle Purchasing: Requests > Submit a New Request > Single Request.
2. Select Catalog Data Extract - Classifications as the Report Name.

Submit Request Window

3. Enter values for the following parameters:
 - Log Level. The recommended value is 2. See the section Select Extractor Options above for more information on the Log Level field.
 - Commit Size. See the section Select Extractor Options earlier above for more information on the Commit Size field.
4. Choose OK to return to the Submit Request window.
5. Choose Submit to execute the program.
6. Once the request has completed successfully, choose: Submit a New Request > Single Request.

7. From the Submit Request window select Catalog Extract Data - Items in the Name field and follow the same steps as above for submitting the classifications program.

Purging data is recommended. To purge data:

1. Once the classifications and item requests have completed processing, choose Submit a New Request > Single Request to return to the Submit Request window.
2. Select Catalog Extract Data - Purge in the Name field.
3. Enter values for the Log Level and Commit Size using the guidelines specified in the section Select Extractor Options, earlier above.
4. Choose OK to return to the Submit window.
5. Choose Submit to execute the program.

To rebuild the Item interMedia Index only if problems, such as data corruption, occur:

1. Once the classifications and item requests (and the purge request, if performed) have completed processing, choose: Submit a New Request > Single Request.
2. In the Submit Request window, select Rebuild Catalog Item interMedia Index in the Name field.
3. Choose OK to return to the Submit Request window.
4. Choose Submit to execute the program.

You should monitor requests after you submit them, to be sure they completed successfully. To monitor the requests:

1. In Oracle Purchasing, choose Requests.
2. Use the Find Requests window to monitor the status of the requests.
3. Choose View Log to check for errors. See Viewing the Log File, below.

Viewing the Log File:

Use the Requests window to access the log files for each program of the catalog extractor. Select the corresponding Request ID of the program whose log file you want to review and click View Log to open the file.

Monitoring Requests

The screenshot shows a window titled 'Requests' with a table of request details and several control buttons. The table has columns for Request ID, Name, Parent, Phase, Status, and Parameters. The buttons include Refresh Data, Find Requests, Submit a New Request..., Hold Request, View Details..., View Output, Cancel Request, Diagnostics, and View Log...

Request ID	Name	Parent	Phase	Status	Parameters
1730826	Catalog Data Purge		Pending	Standby	2, 2500
1730823	Catalog Data Extract - Ite		Running	Normal	2, 2500
1730812	Catalog Data Extract - Cl		Completed	Normal	2, 2500
1721551	Catalog Bulk Load - Item		Completed	Normal	ap503cmr.us.oracle.com, /nfs/grou
1718278	Receiving Transaction Pi		Completed	Normal	IMMEDIATE, 11435
1718275	Receipt Traveller Concur		Completed	Normal	P_group_id=11434, P_receipt_sou
1718274	Receiving Transaction Pi		Completed	Normal	IMMEDIATE, 11434
1718272	Receipt Traveller Concur		Completed	Normal	P_group_id=11433, P_receipt_sou
1718271	Receiving Transaction Pi		Completed	Normal	IMMEDIATE, 11433
1718270	ADS (Pay On Receipt Au		Completed	Normal	ERS, 1, 9968, 0

If you chose a Log Level of at least 3 when running the programs, the View Log window provides clear explanations for any item or classification that was not extracted. (If an item or classification does not meet the requirements described in the section Extractor Requirements for Purchasing Data later below, it does not get extracted.)

For items, the log informs you of failed extractions only if the item and all associated documents are not extracted. For example, if an item exists on an inactive blanket purchase agreement, but its master item record is extracted, no message is shown for the item's blanket purchase agreement record failing extraction.

Only the person who performed the extraction can view the log.

Profile Options

The following profile options affect the extractor:

- POR: Bulk Loader/Extractor Commit Size sets the number of records that are processed at a time. By default, it is set to 2500; however, you can change this default depending on the volume of purchasing data you expect to extract and your database configuration. See: Set Profile Options, page 2-38.
- POR: Extract BPA/Quote Images, when set to Yes, extracts images along with blanket purchase agreement or catalog quotation items if they are associated with image files or image URLs. (By default this profile option is set to Yes.) See: Managing Images, page 4-36.

Function Security

None

Workflow

None

Implementation Considerations

The following sections describe extractor requirements and other considerations.

Extractor Requirements for Purchasing Data

The extraction criteria for each of the following data elements is explained in further detail below:

- Purchasing categories
- Blanket purchase agreements
- Global blanket agreements (blanket purchase agreements for which Global is selected)
- Catalog quotations
- Requisition templates
- Approved supplier list (ASL) entries
- Items from the item master file, including internally orderable items

The extractor does not extract outside processing items.

The extractor extracts all of the data listed above; however, the search results in Oracle iProcurement use the order of priority listed above, starting with blanket agreements and quotations and ending with master items, to avoid displaying duplicate items. For example, if an item exists both in the item master and on a blanket purchase agreement, then the search results display only the blanket purchase agreement (provided you are extracting both master items and blanket agreements). If you extract both requisition templates and ASLs and an item exists on both, then the search results display only the requisition template. If, however, an item exists on more than one blanket or quotation (for example, on a quotation and a blanket agreement), then the search results display the item once from each document (for example, the item displays twice - once with the quotation number and once with the agreement number).

If the extracted items include updates to items that requesters have placed on favorites lists, the favorites lists are also updated. (Saved carts are not updated, but upon checkout, Oracle iProcurement will alert the requester to items that no longer exist or are no longer valid.)

The item data that is extracted is as follows: supplier, supplier site, category, item number, item description (not the Long Description from Oracle Bills of Material), unit of measure (UOM), price, currency, supplier item number, attribute 13 (for images, if any, on blanket agreements or catalog quotations), and attribute 14 (for image URLs, if any, on blanket agreements or catalog quotations). If extracting requisition templates, the requisition template name is also extracted and displayed as a public shopping list. If extracting items from agreements or quotations, the agreement or quotation number is also extracted; the number displays to the requester in the search results and item details if it is set up to display using schema editing.

Regardless of the operating unit from which you run the extractor, the data is extracted from all operating units. Each requester sees only data that is created or enabled in the requester's operating unit.

Purchasing Categories

For categories to be extracted into the Oracle iProcurement catalog, the following requirements must be satisfied:

- The category belongs to the Purchasing Category set.
- The category is Enabled for iProcurement in the Categories window. (See the *Oracle Inventory User's Guide*, or the online Help for the Categories window.)
- The category is active.

Oracle iProcurement extracts the category description, such as Computers and Monitors, and displays that as the category name in Oracle iProcurement. If there is no category description, it extracts the category code, such as IT.COMPUTER, and makes that the category name.

Blanket Purchase Agreements

Items on blanket purchase agreements appear in the Oracle iProcurement catalog if the following conditions are met:

- The blanket purchase agreement is approved and valid (not canceled, closed, finally closed, or frozen).
- The blanket purchase agreement header and line are active. (Their effective dates include today.)
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.

Global Blanket Agreements

Items on global blanket agreements appear in the Oracle iProcurement catalog if the following conditions are met:

- The global blanket agreement meets the same requirements as given for blanket purchase agreements, above.
- Since global blanket agreements are created in one operating unit and enabled in others, the following conditions must also be met to ensure that the global blanket agreement is valid in its enabled operating units:
 - The owning organization (operating unit in which the global blanket agreement was created), enabled operating unit (requester's operating unit), and the Purchasing Org (purchasing operating unit) must all be active operating units.
 - If the item on the global agreement is a master item, then the item must exist in both the enabled operating unit's FSP organization and in the Purchasing Org's FSP organization. (The FSP organization is the Inventory Organization selected for the operating unit in the Supplier-Purchasing tabbed region of the Financial System Parameters window.) The item must be purchaseable, and not an outside processing item, in both inventory organizations.

Note: If the item is assigned to a different category in the enabled FSP organization than in the owning FSP organization, then Oracle iProcurement shows the category from the owning organization. (That is, the extractor extracts the item information itself from the owning organization; the item must additionally exist in both the enabled and purchasing FSP organizations.)

- If the item on the global agreement is a master item, the UOM class used on the agreement must match the UOM class defined for the master item.

Note: The Purchasing Site on the global agreement does not have to be a valid site in the enabled (requester's) operating unit.

Catalog Quotations

Items on quotations appear in the Oracle iProcurement catalog if the following conditions are met:

- The quotation is of type Catalog. No bid quotations are extracted.
- The quotation is active.
- If the quotation requires approval (Approval Required is selected), the item must have at least one price break, the price break must have effective dates that include today (price breaks dated in the future are not included), and the price break must be approved for All Orders or Requisitions.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.

Requisition Templates (Public Lists)

Items on requisition templates appear in the Oracle iProcurement catalog if the following conditions are met:

- The template is active.
- The item was not copied from a blanket purchase agreement header or line that is unapproved, canceled, closed, finally closed, or frozen, or whose effective dates do not include today.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.
- The template header has been extracted.
- The item does not already exist on an extracted blanket purchase agreement, global blanket agreement enabled in the item's operating unit, or quotation.

Requisition templates display as public lists in Oracle iProcurement. (In the Shop tab, click Shopping Lists to display public lists.)

Public List

Shop Requisitions Receiving Contractors

Stores | Categories | Shopping Lists | Non-Catalog Request | Contractor Request

Shop: Stores >

Shopping List: New IT Hires

Select List Sort by

<u>CSI Laptop</u>			
Category	Computer Software - Other	Supplier	Supplier Site
Supplier Item		Internal Item Number CSI Laptop	Contract Number
Price	1,160.00 USD	Unit Each	
Quantity	<input type="text" value="1"/>	<input type="button" value="Add to Cart"/>	
This item is internally stocked. Click here to select a source.			
<u>PAPER.12.8.5.WHITE</u>			
Category	Computer Software - Other	Supplier	Supplier Site
Supplier Item		Internal Item Number TXX-006	Contract Number
Price	0.05 USD	Unit Each	
Quantity	<input type="text" value="10"/>	<input type="button" value="Add to Cart"/>	
<u>CELL PHONE 7Z</u>			
Category	BVK.MISC-1	Supplier	Supplier Site
Supplier Item		Internal Item Number 77CELL*23904	Contract Number
Price	0.00 USD	Unit Each	
Quantity	<input type="text" value="1"/>	<input type="button" value="Add to Cart"/>	
This item is internally stocked. Click here to select a source.			
<u>AD-Palm Pilot</u>			
Category	Computer Software - Other	Supplier	Supplier Site
Supplier Item		Internal Item Number AD-Palm Pilot	Contract Number
Price	450.00 USD	Unit Each	
Quantity	<input type="text" value="2"/>	<input type="button" value="Add to Cart"/>	
This item is internally stocked. Click here to select a source.			

Your Rec Cons

The figure above shows a requisition template named New IT Hires displaying as a public list on the **Shopping List** page.

If you entered a Suggested Quantity on a requisition template line in Oracle Purchasing, then that quantity defaults into the Quantity field when viewing the public list, as shown above. (The suggested quantity for the item defaults only in the public list, not in the search results.) The requester can add any or all items on the list to the cart; the cart preserves the suggested quantities. The requester can change the suggested quantity at any point.

In addition to requisition template items appearing in the catalog, matching requisition template names (for both purchaseable and internal type templates) also appear as shopping lists in the Related Links box on the **Search Results** page.

The same item that exists on multiple requisition templates displays as just one item in the search results; however, requesters can access all requisition templates for the item by clicking the shopping lists related link on the **Search Results** page.

Approved Supplier Lists (ASL)

Items associated with ASLs appear in the Oracle iProcurement catalog if the following conditions are met:

- The ASL entry is item based, not commodity based.
- The ASL entry is not disabled.
- The supplier is enabled and allowed to source the item. (The supplier is assigned a status in the ASL entry that enables it to source the item.)
- The item has a list price associated with it in the Master Item window.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.
- The item does not already exist on an extracted requisition template, blanket purchase agreement, global blanket agreement enabled in the item's operating unit, or quotation.

Purchasable Master Items

Purchasable items from the master item file (defined in the Master Item window) appear in the Oracle iProcurement catalog if the following conditions are met:

- The item is Purchasable in the Purchasing tabbed region of the Master Item window.
- The item is not a configurable item. In the Master Item window, a configurable item is one in which Assemble to Order is selected in the Order Management tabbed region, a Base Model value is provided in the Bills of Material tabbed region, and Autocreate Configuration is selected in the Bills of Material tabbed region.
- The item has a List Price associated with it in the Purchasing tabbed region of the Master Item window.
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.
- The item does not already exist on an extracted ASL, requisition template, blanket purchase agreement, global blanket agreement enabled in the item's operating unit, or quotation.

Internal Master Items

Internally orderable items from the master item file appear in the Oracle iProcurement catalog if the following conditions are met:

- The item is Internal Orders Enabled in the Order Management tabbed region of the Master Item window.
- The item is not a configurable item. (See the description of a configurable item in Purchasable Master Items, above.)
- The item belongs to a purchasing category that satisfies the requirements stated in the Purchasing Categories section. The category has been extracted.

- The item does not already exist on an extracted ASL, requisition template, blanket purchase agreement, global blanket agreement enabled in the item's operating unit, or quotation.

That is, if the item exists only as a master item (for example, it is not also on an ASL), then it displays in the search results. If, however, it exists both as a master item and as an item on a document or ASL, then the document or ASL item displays in the search results, based on the hierarchy discussed earlier in this section. (For example, an agreement takes precedence over an ASL in the search results.) In this case, the master item source itself would display only if you have enabled the "Click here to select a source" link, which displays the **Select Item Source** page. (See *Manual Source Selection*, page 5-66.) If you enable requesters to select an item source for an internal item, then the **Select Item Source** page displays all sources of that item, including its internal inventory source and its external sources (ASL and agreement, for example), if POR: Legal Requisition Type is set to BOTH.

If the internal requisitions functionality in Oracle Purchasing is set up, the extracted internal items can be placed on internal requisitions. See the *Oracle Purchasing User's Guide*.

Translating Purchasing Data

Translations provided for both categories and items in the master item file are reflected in the Oracle iProcurement catalog. When creating categories and master items in Oracle Purchasing, use the translation icon to provide descriptions for the languages installed in your environment. When you extract categories and master items, requesters can see the translated values based on their catalog language preference while searching the Oracle iProcurement catalog.

For more information on translating data in Oracle Applications, please refer to the *Oracle Applications User's Guide*.

Currency Conversion

Oracle iProcurement performs currency conversions as follows, when the document's currency differs from the requester's currency, to display the item price in the requester's functional currency:

- For blanket purchase agreements and quotations, Oracle iProcurement uses the Rate Type from the document. It uses the document creation date as the Rate Date to obtain the appropriate exchange rate.
- For global blanket agreements, Oracle iProcurement uses the Rate Type from the Purchasing Options for the enabled (requester's) operating unit and the date that the document was extracted to obtain the appropriate exchange rate.

Uploading Updates to Extracted Items

For information on what happens when you use the uploading feature to update extracted items, see the appendices on loading catalog data later in this guide.

Loading Catalog Data

The Oracle iProcurement catalog supports uploading of catalog data. Catalog data consists of the items and services available for purchase as well as the associated prices for these goods.

Catalog data may have originated from any of the following sources:

- Downloaded from an Oracle Exchange marketplace, such as Exchange.Oracle.com.
- Obtained directly from a supplier.
- Obtained from a third-party catalog provider.
- Created internally.

The loader supports item catalogs created in the following formats:

- Tab-delimited text file (spreadsheet)
- XML
- Catalog Interchange Format (CIF)
- cXML (commerce eXtensible Markup Language, which is based on the XML language)

The catalog loader also supports the creation of catalog schema using XML files. The catalog schema consists of a combination of categories, local descriptors used to describe items in a specific category, and base descriptors used to describe any item or service in the catalog.

Setup Steps

To use the catalog loader to populate the Oracle iProcurement catalog, the following setup steps must be performed:

1. To ensure that you can download instructions and templates (such as the Readme files) in the eContent Manager, verify Parameters in the ssp_init.txt file:

Ensure the following line is present in the [iAS ORACLE_HOME]/Apache/Jserv/etc/ssp_init.txt file and is set accordingly:

```
icxCatalogTemplateRoot=<OA_HTML>/US/
```

If this setting is incorrect, then the Zip file of instructions and templates will contain no data.

2. Set or review the profile options listed in Profile Options, page 4-28.
3. If you will be uploading cXML files, download the latest cXML DTD from <http://www.xml.org/> and copy it to the \$ICX_TOP/xml/orc115 directory.

The Document Type Definitions (DTDs) for the item and schema XML files are automatically copied to the \$ICX_TOP/xml/orc115 directory. Perform this step for cXML loading only.

4. Optionally set up category mapping in Oracle e-Commerce Gateway.
See Define Category Mapping, page 4-29 for details.
5. If you will be uploading CIF or cXML files, optionally define classification and supplier domains.
See Define Classification and Supplier Domains, page 4-34 for details.
6. Optionally define rollback segments.

Use the Concurrent Programs window to define rollback segments for each of the loader programs:

- Catalog Bulk Load - Items & Price Lists
- Catalog Bulk Load - Catalog Structure

Rollback segments are used by the database to store the information needed to undo changes when necessary (for example, during a system failure). Defining rollback segments is optional, because the default rollback settings should be adequate. If you choose to define rollback segments, however, get help from your database administrator. Defining rollback segment sizes can affect the successful completion and performance of the extractor.

For more information on managing concurrent programs, see the *Oracle Applications System Administrator's Guide*.

Loading Instructions

For instructions on uploading tab-delimited text or XML files, including schema files, see the appendices.

For information on uploading cXML or Catalog Interchange Format (CIF) files, see the online Help in the eContent Manager.

Managing the Loader

The catalog loader is controlled by the concurrent manager, the program that operates the Submit Request window for submitting and viewing requests. If the concurrent manager is running, the catalog loader is running.

You can monitor loader jobs using either the eContent Manager (where files are uploaded) or the Requests window in Oracle Applications (shown in the Monitoring Requests figure earlier). If you have trouble diagnosing an error in an upload, you may get more details using the View Log button in the Requests window. (After the loader completes, it automatically runs the interMedia Index, the status of which displays in the log.)

For instructions on monitoring loader jobs through either the eContent Manager or the Requests window, see the Loading Your File sections in the appendices later in this guide.

Profile Options

Set or review the following profile options if you will be uploading files; see Set Profile Options, page 2-38 for descriptions:

- FND: NATIVE CLIENT ENCODING
- ICX: Client IANA Encoding
- POR: Apply Category Mapping
- POR: Approved Pricing Only
- POR: Bulk Load for All Business Groups
- POR: Bulk Loader/Extractor Commit Size
- POR: Catalog Bulk Load Directory
- POR: Default Currency Conversion Rate Type
- POR: Hosted Images Directory
- POR: Load Auto Attrib

- POR: Load Auto Category
- POR: Load Auto Root
- POR: Purge Jobs Older Than (days)
- POR: Set Debug Catalog Loader ON

Function Security

The POR_SSP_ECMANAGER function controls access to the eContent Manager page from which files are uploaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

Workflow

None

Implementation Considerations

No additional considerations.

Define Category Mapping

You can use category mapping in Oracle e-Commerce Gateway for local, punchout, and transparent punchout catalogs. For instructions on setting up category mapping for punchout or transparent punchout catalogs, see the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*. For local catalogs, use the instructions below.

When uploading to the local catalog, you have the option of applying category mapping to the file. For example, the external category File Folders is mapped in Oracle e-Commerce Gateway to the Oracle Applications category OFFICE.SUPPLIES. Using the eContent Manager, you upload a file that specifies the category File Folders for an item. You choose to apply category mapping during the load as shown in the figure below. In this example, the loader maps the category File Folders to the category OFFICE.SUPPLIES in Oracle Applications. The item is uploaded to OFFICE.SUPPLIES.

The apply category mapping feature performs the same mapping that the **iProcurement Category Mapping** page does in the eContent Manager, except that it does the mapping during uploading. (**iProcurement Category Mapping** is employed when the requester adds the items to the cart.) Typically, you would use one method or the other to do mapping.

Category Mapping Option on the Specify Options Page

ORACLE® eContent Manager

[Home](#) [Logout](#) [Preferences](#) [Help](#)

Specify Options: item.xml

These optional fields apply to all items in the file. Cancel Upload

Supplier

Operating Unit

Supplier Site

Contract Purchase Agreement

Negotiated Prices

Apply Category Mapping?

Do you want to map the categories in this file to Oracle Purchasing Categories?

Yes

No, use the values from the file

Cancel Upload

You do not have to apply the Oracle e-Commerce Gateway category mapping during uploading. (You can choose No on the **Specify Options** page. For example, you may want to use the mapping for punchout catalogs or some other purpose only.)

For more mapping examples, see the online Help in the eContent Manager on loading data.

Setup Steps

To set up category mapping for local catalogs:

1. For each category in Oracle Applications to which you will be mapping external categories, make sure Enabled for iProcurement is selected in the Categories window and the category is extracted. Otherwise, the mapping will fail.
2. Set or review the profile options listed in Profile Options, page 4-32.
3. In Oracle Applications, access the e-Commerce Gateway application and use the following navigation to open the Code Conversion Values window: Setup > Code Conversion > Define Code Conversion Values.

The code conversions you define here apply to all operating units.

Code Conversion Values Window

Category	Description	Direction	Key 1	Key 2	Internal Value	External 1	Key 3
ITEM_CATEGO		IN	A Supplier		OFFICE.SUPI	File Folders	
ITEM_CATEGO		IN			MISC.MISC	Promotional	
ITEM_CATEGO		IN	B Supplier		OFFICE.SUPI	Folders	

4. In the Category field, select ITEM_CATEGORY.
5. Enter your own Description for the mapping, if desired.
A Description can help you determine what the mapping is for, if you need to edit it in the future.
6. For the Direction, enter IN.
7. For Key 1, enter a supplier name if the mapping applies only to a specific supplier, or leave this field blank to apply the mapping to all suppliers.

If the mapping applies to a specific supplier, enter the supplier name exactly as it was defined in the Supplier Name field in the Suppliers window, including using the same case. Otherwise, the mapping specific to this supplier will fail when you upload.

Note: The Key 1 field allows a maximum of 30 bytes. If the supplier's name is greater than 30 bytes, enter the Supplier Number (from the Suppliers window) in the Key 5 field. If Oracle iProcurement cannot find a match on the supplier name, it will look for a match on the supplier number in the Key 5 field.

8. Key 2 through Key 4 are not used.
9. For the Internal Value, enter the category code that Oracle Applications uses.
Enter the category code exactly as defined in Oracle Applications, such as MISC.MISC. Otherwise, the mapping will fail when you upload.
10. For the External 1 value, enter the category code that the supplier in the upload file uses.
An upload file can use either the category name (such as File Folders) or category key (such as UNSPSC_44.12.20.11) to specify the category. You can enter either the name or key in the External 1 field.
11. The fields External 2 through External 5 are not used.

12. If you want to map more than one external code to a single internal code, create a new row for each mapping.

You cannot map a single external category code to more than one internal category code, unless you are doing so for different suppliers.

Mapping occurs during the upload.

Profile Options

- POR: Apply Category Mapping. Setting this profile to Yes defaults the Apply Category Mapping option on the **Specify Options** page to Yes. Setting it to No defaults the Apply Category Mapping option to No.
- POR: Load Auto Category. If this profile is set to Yes *and* if the mapping was not successful, then Oracle iProcurement creates the category during the upload.

Function Security

The POR_SSP_ECMANAGER function controls access to the eContent Manager page from which files are uploaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

Workflow

None

Implementation Considerations

Decide whether to create supplier-specific category mapping, or mapping that applies to all suppliers.

If the Apply Category Mapping option was selected on the **Specify Options** page, the catalog loader performs the following steps depending on whether you have set up supplier-specific mapping:

1. The loader checks whether supplier-specific mapping exists in Oracle e-Commerce Gateway for the category in the upload file:
 - Is there a match between the Supplier specified in the file and the supplier specified in the Key 1 or Key 5 field? (If you specified a supplier name in the file, but the supplier number in the Key 5 field, then the loader finds the match.) This check is case sensitive because supplier names are case sensitive in Oracle Applications.
 - Is there a match between the category specified in the file and the category specified in the External Value 1 field, for that supplier?
Note: The mapping works on extracted categories only. If the internal mapped category (OFFICE.SUPPLIES in the earlier example) has not been extracted, the mapping fails. Recall that only iProcurement-enabled categories get extracted.
2. If supplier-specific mapping does not exist, the loader looks for the same category mapping where both Key 1 and Key 5 are blank (no supplier is specified).
3. If mapping exists, the loader applies the conversion.

The loader performs the mapping on the category name specified in the file; however, if you also specified a category key in the file, Oracle iProcurement tries to map the key if it couldn't map the name.

The loader chooses supplier-specific mapping over non-supplier-specific mapping, if both exist. The following table shows an example:

Category	Direction	Key 1	Internal Value	External Value 1
ITEM_CATEGORY	IN	Supplier A	MISC.MISC	Software
ITEM_CATEGORY	IN		COMP.SFTW	Software
ITEM_CATEGORY	IN		COMP.HDW	Hardware

In this example:

- A catalog file for Supplier A specifies the category Software. The loader maps Software to MISC.MISC.
- A catalog file for Supplier B specifies the category Software. The loader maps Software to COMP.SFTW.
- A catalog file for Supplier A specifies the category Hardware. The loader maps Hardware to COMP.HDW.

If there is a problem with the supplier-specific mapping—for example, the category in the Internal Value field does not exist in Oracle Applications (it was entered wrong)—the loader does not use the non-supplier-specific mapping, but rejects the item, if POR: Load Auto Category is set to No. This way, an error message informs you there is a problem with the mapping, and you can correct it. (If POR: Load Auto Category is set to Yes, then the item is loaded to the category specified in the file.)

Since the loader looks only at the Key 1 (or Key 5), Internal Value, and External Value fields to determine the mapping, it might find mappings that are the same. For example, if you set up two ITEM_CATEGORY mapping rows for use with another application, identical except for their Key 2 fields, the loader considers these identical. If the loader finds multiple, identical mappings, it rejects the item if POR: Load Auto Category is set No.

4. If you have also set up category mapping on the **Oracle Purchasing Category Mapping** page in the eContent Manager, that mapping is additionally taken into account.

For example, File Folders in the upload file is mapped to OFFICE.SUPPLIES in the Code Conversion Values window. OFFICE.SUPPLIES is mapped to Office Supplies/Furnishings on the **Oracle Purchasing Category Mapping** page. The loader maps File Folders to OFFICE.SUPPLIES, but the requester sees the item in Office Supplies/Furnishings.

See the online Help about loading data in the eContent Manager for more mapping examples.

Define Classification and Supplier Domains

If you will be loading CIF or cXML files, you can optionally define classification and supplier domains.

When uploading CIF or cXML files, the **Specify Options** page enables you to select a single classification or supplier domain to use for the entire file. See the figure below. (Multiple supplier domains are used by cXML only.)

- Classification domains are used to identify the system by which categories are known. For example, the United Nations Standard Product and Service Code (UNSPSC) is a classification domain.
- Supplier domains are used to identify the system by which suppliers are known. For example, a Dun and Bradstreet DUNS number is a supplier domain.

CIF and cXML files can contain multiple domains to identify a category or supplier for an item. A supplier may include multiple domains in a file so that the file can be used by multiple buyers. For example, some buyers use UNSPSC codes; others may use another classification code. In this case, the supplier creates a single file, but specifies two classification domains. Each buying company chooses the classification domain its company uses.

Although the file may contain multiple domains, the loader can process only one domain at a time. The domain you select or enter on the **Specify Options** page must match a domain in the file. The loader then uses the domain for the entire file. For example, if you specify the UNSPSC domain that the supplier uses in the file, the category name that is loaded with the item is the UNSPSC category. If that is not the name that Oracle iProcurement uses for the category, specify another domain in the file that uses the naming you use.

To specify a domain while uploading (see the figure below), select the desired domain from the drop-down menu. The menu lists all domains that it detected in your file, plus any additional domains that you defined (see Setup Steps below).

Specifying Domains While Bulk Loading CIF or cXML Files

ORACLE[®] eContent Manager

Home Logout Preferences Help

▶ Load Data and Schema
▶ Manage Content
▶ Download From Exchange
▶ Online Schema Maintenance
Maintenance

Specify Options: Appendix 4.3_contract.xml

These optional fields apply to all items in the file. Cancel Upload

Classification Domain

Lines will be rejected if the file contains multiple domains and you do not select a domain.

Supplier Domain
 Name

Operating Unit

Selecting All Operating Units makes your file available to all users.

Supplier Site

Supplier and Operating unit must be selected.

Contract Purchase Agreement

Negotiated Prices

Apply Category Mapping?

Do you want to map the categories in this file to Oracle Purchasing Categories?

Yes
 No, use the values from the file

You do not have to define domains; however, if you do, they appear in the domains drop-down menu when you click the flashlight icon. Defining the domains that you accept can provide consistency in the category and supplier names that are chosen for items in CIF or cXML files.

Setup Steps

If you want to establish valid domains for your company that a catalog author can select on the **Specify Options** page, define them as lookups in Oracle Applications:

1. Log on to Oracle Applications using the Application Developer responsibility.
2. Access the Application Object Library Lookups window using the following navigation: Application > Lookups > Application Object Library.
3. Query the following lookup Types:
 - Use the Type ICX_CAT_CLASSIFICATION_DOMAINS to define classification domains.
 - Use the Type ICX_CAT_SUPPLIER_DOMAINS to define supplier domains.

Application Object Library Lookups Window

The screenshot shows the 'Application Object Library Lookups' window. At the top, there are input fields for 'Type' (set to ICX_CAT_CLASSIFICATION_DOMAINS), 'User Name' (POR: Classification Domains), 'Application' (Oracle Self-Service Web Applications), and 'Description' (Classification Domains displayed on bulk load options). To the right, the 'Access Level' section has radio buttons for 'User' (selected), 'Extensible', and 'System'. Below this is a table with columns: Code, Meaning, Description, Tag, From, To, and Enabled. The table contains three rows of data.

Code	Meaning	Description	Tag	From	To	Enabled
CAT_1	Category Domain 1			2002/12/23		<input checked="" type="checkbox"/>
UNSPSC	UNSPSC			2002/12/23		<input checked="" type="checkbox"/>
UNSPSC_WR	UNSPSC_WRITINGS			2002/12/23		<input checked="" type="checkbox"/>

4. For the lookup type, enter a Code and Meaning.

The Meaning displays as the domain value in the drop-down menu next to the domain field on the **Specify Options** page.

5. Optionally enter any of the other fields for each lookup code (domain) you define.

For more information on defining lookups, access the online Help for the Application Object Library Lookups window or see the *Oracle Applications Developer's Guide*.

Profile Options

None

Function Security

The POR_SSP_ECMANAGER function controls access to the eContent Manager page from which files are uploaded. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

Workflow

None

Implementation Considerations

No additional considerations.

Setting Search Related Options

As part of the catalog setup, you should do the following:

- Understand how the catalog search engine works. See Appendix D.
- Review the profile options that affect searching. See the list of profile options in Search Configuration, page D-13. Set or change these profile options as desired.
- Review and update descriptors and default descriptor properties, if desired. See the Schema Editing section in Search Configuration, page D-13.

Managing Images

Images in the catalog are one of the following kinds:

- Images that display on the **Item Details** page when requesters view the details of an item. See the following figures. You can extract or upload items that reference these images.
- Smaller, thumbnail versions of the images that display on the **Search Results Summary**, **Search Results**, and **Compare Items** pages for items. See the following figures. You can extract or upload items that reference these images.
- Images associated with stores that display on the **Shop** home page. See the figure at the beginning of this chapter. You can reference these images when creating your store.
- Images associated with a punchout or an informational catalog that display on the **Search Results Summary** page. See the figure earlier in this chapter. You can reference these images when creating the punchout or informational catalog.

Including images in the catalog is optional. If you provide images for items, the corresponding image displays when a requester searches for and views items, assisting the user in selecting the correct item for purchase. JPEG and GIF image formats are recommended.

Note: Images associated with transparent punchout items are hosted externally by the supplier site or marketplace. For more information, see

the Oracle Procurement Supplier's Guide to Punchout and Transparent Punchout.

Image on Item Details Page

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

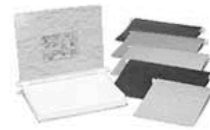
Shop [Requisitions](#) [Receiving](#) [Contractors](#)

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#) | [Contractor Request](#)

Search Main Store [Advanced Search](#) [Shop Other Stores](#)

[Shop: Stores](#) > [Search Results](#) >

Item Details



Press Binder

Quantity

Shopping Cart

Your cart contains 2 lines.

Recently Added Lines

AD-Palm Pilo...	2
CELL PHONE 7...	1

Supplier	Office Things
Supplier Site	Seattle
Supplier Item	RLK-123456
Supplier Part Auxiliary ID	
Internal Item Number	

Thumbnail Images on Search Results Page

Search Main Store [Advanced Search](#) [Shop Other Stores](#)

[Shop: Stores](#) >

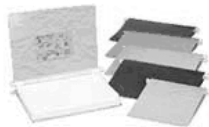
Search Results from Office Supplies: office things

Sort by

Search results filtered by **No active filter.**

[Press Binder](#)

Metal-edge binders on the folders hold papers fast in place




Category	Office Supplies	Supplier	Office Things	Supplier Site	Seattle
Item Category					
Supplier Item	RLK-123456	Internal Item Number		Contract Number	
Price	0.43 USD	Unit	EA		

Quantity

[Rollerball Pen](#)

Fine-point, rollerball pen with grip, black ink



Category	Office Supplies	Supplier	Office Things	Supplier Site	Seattle
Item Category					
Supplier Item	RLK-123666	Internal Item Number		Contract Number	
Price	1.89 USD	Unit	EA		

Quantity

Shopping Cart

Your cart contains 2

Recently Added Li

AD-Palm Pilo...	2
CELL PHONE 7...	1

Compare Items

No items selected.

Related Links

Categories

- [Office Supplies](#)

[More...](#)

Shopping Lists

[Click here to see all shopping lists.](#)

Item Without an Image on Item Details Page

Search Main Store [Advanced Search](#) [Shop Other Stores](#)

[Shop: Stores](#) > [Search Results](#) >

Item Details

Shopping Cart

Your cart contains 2 lines.

Recently Added Lines

AD-Palm Pilo... 2
CELL PHONE 7... 1

[View Cart and Ch](#)

Press Binder

Quantity

Supplier	Office Things
Supplier Site	Seattle
Supplier Item	RLK-123456
Supplier Part Auxiliary ID	
Internal Item Number	

Item Without a Thumbnail Image on Search Results Page

[Shop: Stores](#) >

Search Results from All Local Content: office things

Sort by

Search results filtered by **No active filter.**

Palm Pilot

Linux-based Palm Pilot, with calendar, PC, e-mail, and v-mail integration

Category **Office Supplies Item Category** Supplier **Office Things** Supplier Site

Supplier Item **RLK-123444** Internal Item Number Contract Number

Price **550.00 USD** Unit **EA**

Quantity

Toner

Black and white toner cartridge for Apple LaserWriter II



Category **Office Supplies Item Category** Supplier **Office Things** Supplier Site **Seattle**

Supplier Item **RLK-123555** Internal Item Number Contract Number

Price **68.13 USD** Unit **EA**

Quantity

Shop

Your
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⊙ ⊙

More

Shop

[Click](#)
[shop](#)

Note: Individual requesters can use their iProcurement Preferences to disable thumbnail images in the search results if they desire. If so, the text description of the item fills the entire horizontal space, with no thumbnail image. Punchout and informational catalog images also do not display in the search results if the requester disables thumbnails.

Setup Steps

Extracting Items with Images:

You can associate items on blanket purchase agreements and catalog quotations with images to enhance the shopping experience.

Images on extracted blanket agreement or quotation lines can be stored on a local server or specified in a URL.

Extracting Image Files Stored on a Local Server

To associate an image file with a blanket purchase agreement or quotation line item, perform the following steps:

1. Make sure the profile option POR: Extract BPA/Quote Images is set to Yes.
2. Populate the profile option POR: Hosted Images Directory with the directory path used to store image files.

This path usually corresponds to the OA_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA_MEDIA directory.

3. Copy your images to this directory.
4. Define Attribute 13 as a descriptive flexfield on the PO_LINES table. Use this flexfield to store the image name, for example mech_pencil.gif.

Note: The file name for the image is case sensitive. For example, if the image file name is bluepen.gif, but you specify BluePen.gif in the descriptive flexfield, the image will not display.

5. Populate this flexfield for each blanket agreement and catalog quotation line item that has an associated image.
6. Run the catalog extractor.

In Oracle iProcurement, the image appears on the **Item Details** page and as a thumbnail on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. If you want to resize the thumbnail image, see the instructions on creating thumbnail images for items.

Extracting Image URLs

To associate an image URL with a blanket agreement or quotation line item, perform the following steps:

1. Make sure the profile option POR: Extract BPA/Quote Images is set to Yes.
2. Define Attribute 14 as a descriptive flexfield on the PO_LINES table. Use this flexfield to store the image URL, such as <http://www.oracle.com/homepageimages/logo.gif>.

3. Populate this flexfield for each blanket agreement and catalog quotation line item that has an associated image URL.
4. Run the catalog extractor.

In Oracle iProcurement, the image appears on the **Item Details** page and as a thumbnail on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. If you want to resize the thumbnail image, see the instructions for creating thumbnail images for items.

Uploading Items with Images:

To upload images, use the PICTURE or THUMBNAIL_IMAGE fields in an XML upload file, or the Image or Thumbnail Image fields in a text upload file. These images can be either files stored internally or URLs that point to an image stored remotely.

You can also use the loader to associate an image with an item you have extracted, if the item has a supplier item number. (The loader requires a supplier item number.) See the instructions for creating thumbnail images for items.

Specifying Image Files Stored on a Local Server

To reference image files stored on the local server:

1. For the POR: Hosted Images Directory profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA_MEDIA directory.

2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Use the PICTURE field in an XML upload file (or the Image field in a text bulk load file) to specify an image for the **Item Details** page. Use the THUMBNAIL_IMAGE field in an XML upload file (or the Thumbnail Image field in a text upload file) to specify a thumbnail image for the search results and comparison pages.

See Appendix A and Appendix B for instructions on preparing and uploading files. See also the instructions for creating thumbnail images for items.

Note: The file name for the image is case sensitive. For example, if the image file name is bluepen.gif, but you specify BluePen.gif in the Image field, the image will not display.

4. Load your catalog file.

Specifying Image URLs

To specify the URL of the image that resides on the Internet:

1. Obtain the full path of the image (for example, <http://www.oracle.com/toplogo2.gif>).
2. Use the PICTURE field in an XML upload file (or the Image field in a text bulk load file) to specify an image URL for the **Item Details** page. Use the THUMBNAIL_IMAGE field in an XML upload file (or the Thumbnail Image field in a text upload file) to specify a thumbnail image URL for the search results and comparison pages.

See Appendix A and Appendix B for instructions on preparing and uploading files. You can use the same image for both the image and thumbnail image, or create separately sized versions. See the instructions for creating thumbnail images for items.

3. Load your catalog file.

Creating Thumbnail Images for Items:

You can upload or extract items with thumbnail images, using an image file or image URL.

There are two ways to create and size thumbnail images:

- Use the same image file name or URL for the Thumbnail Image (THUMBNAIL_IMAGE) field as you used for the Image (PICTURE) field.

Specify the image file names or URLs through uploading or extracting. Then set the POR: Thumbnail Width or POR: Thumbnail Height profile options to resize the thumbnails. These profile options resize all thumbnails, while leaving the original image intact. Specify the desired number of pixels in these profile options. To resize the height and width proportionately, specify the number of pixels for just one profile option. For example, if you specify just POR: Thumbnail Width and leave POR: Thumbnail Height blank, the system automatically resizes the height proportionately to the width, for each thumbnail image. (If you specify both profile options, the sizing you specify is applied equally to all images. If the aspect ratio of an image is not the same as your sizing ratio, the thumbnail image may appear distorted.)

- If the item image and thumbnail image are different, use uploading to specify the separate image file names or URLs.

If you extracted the image, which uses the same image for both item details and thumbnails, use uploading to change one image or the other. The item must have a supplier item number to be updated by the loader. You can use a picture editor to change the size of the thumbnail images. See the instructions for uploading items with images, earlier.

Creating Store or Catalog Images:

Stores, punchout catalogs, and informational catalogs can also be set up to display images, if desired.

Store and catalog images can be either files stored internally or URLs that point to an image stored remotely.

Specifying Image Files on a Local Server

To specify an image stored on the local server:

1. For the POR: Hosted Images Directory profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA_MEDIA directory.

2. Ask your database administrator to transfer the pictures to the directory you specified above.

3. Access the Internet Procurement Catalog Administration responsibility. In the eContent Manager, expand "Manage Content" and click "Stores" to add an image for a store; click "Catalogs" to add an image for a punchout or informational catalog.
4. Specify the image file name in the Image field for the store or catalog.
See the online Help if you need more information.

Specifying Image URLs

To specify the URL of the image that resides on the Internet:

1. Access the Internet Procurement Catalog Administration responsibility. In the eContent Manager, expand "Manage Content" and click "Stores" to add an image for a store; click "Catalogs" to add an image for a catalog.
2. Specify the complete image URL (such as <http://www.oracle.com/toplogo2.gif>) in the Image field for the store or catalog.
See the online Help if you need more information.

Profile Options

POR: Extract BPA/Quote Images should be set to Yes if you want to extract images.

POR: Hosted Images Directory should specify the directory path used to store image files that are used while extracting or uploading items. Usually the path is the location of your OA_MEDIA directory.

The following profile options affect thumbnail images:

- POR: Thumbnail Width (see the instructions for creating thumbnail images, earlier above)
- POR: Thumbnail Height (see the instructions for creating thumbnail images, earlier above)
- POR: Show Thumbnail Images (see Set Profile Options, page 2-38)

Function Security

The POR_SSP_ECMANAGER function controls access to the eContent Manager page from which files are uploaded, and stores and catalogs are defined. Anyone assigned the iProcurement Catalog Administration responsibility already has access to this function.

Workflow

None

Implementation Considerations

If you specify both a server image and an image URL, only the server image displays in Oracle iProcurement.

Note: If your images do not display after following the instructions in the previous sections, then check whether you have multiple middle-tier servers, each on a different box. If you do, then you must copy the OA_MEDIA directory and your images to each server, or make the OA_MEDIA directory an nfs-mounted directory that is shared by all servers.

You cannot extract images for master items that do not exist on a blanket agreement or catalog quotation. If the master item exists on a requisition template or ASL entry with a supplier item number, then you can use the loader to associate an image with the extracted item. (The loader requires a supplier item number.)

By default, Oracle iProcurement uses blank image files (invisible to the requester) to display items that do not have images:

- `ag_placeholder_item.gif`—160 by 160 pixels, used on the **Item Details** page for items without images.
- `ag_placeholder_thumbnail.gif`—100 by 100 pixels, used on the **Search Results Summary**, **Search Results**, and **Compare Item** pages for items without thumbnail images.

If desired, you can replace the default blank image files with different image files. For example, if most of your items have images, you may want to display an image with the text No Image Available for the exceptions rather than a blank space. (This text would display the same in all languages.) The replacement blank image files must have the same names and file format (.gif) as the default ones. The default blank files can be found in the `OA_MEDIA` directory.

The following functionality can also be used to influence images, if you do not want to maintain images at all:

- The item detail visible descriptor property can be used to completely hide detailed images from the **Item Details** pages.
- The search results visible descriptor property can be used to completely hide thumbnails from the **Search Results Summary** and **Search Results** pages, if desired.
- The item detail visible descriptor property can be used to completely hide thumbnail images from the **Compare Item** page.

You can edit descriptor properties online in the eContent Manager or through uploading schema. See Appendix C for more information on descriptors.

Additional Considerations for Thumbnails

The recommended height and width for thumbnail images is 100x100 pixels. You should not exceed a width of 280 pixels because the column width on the **Compare Items** page is 280 pixels; if the thumbnail image exceeds that, the image will wrap.

Additional Considerations for Store and Catalog Images

The recommended image dimensions for a store or catalog image is 70 by 55 pixels.

By default, Oracle iProcurement uses a blank image file (invisible to the requester) to display items that do not have images. For stores without images on the **Shop** home page, it uses `ag_placeholder_store.gif` (70 by 55 pixels) to display the blank image. (Punchout and informational catalogs have no default blank image. When no image is specified, they display only the catalog name and description on the **Search Results Summary** page.)

If desired, you can use standard clip art icons that Oracle Applications Framework provides. Look in the `OA_MEDIA` directory for these image files. For example, the file `medicalequipment_cctitle.gif` is a small picture of a stethoscope, which you could use as an image for a medical supplies store.

Defining Realms

Realms are securing attributes used to control access to the catalog as an additional layer for application security. You can create the following two kinds of realms:

- A category realm is a set of access privileges to categories contained in the local catalog.
- An item source realm is a set of access privileges to punchout, transparent punchout, or informational catalogs.

Once you create a realm, you assign it to a responsibility or user. The requester associated with that responsibility or user can see whatever categories or item source catalogs are contained in that realm.

Note: If you restrict a requester's access, using realms, to all catalogs in a store, the store does not display at all to the requester.

Category Realms Example

Assume the following item categories exist in the local catalog:

- Medical/Surgical Equipment
- Medical/Surgical Supplies
- Notepads
- Writing Instruments

Because of the nature of the items contained in the Medical/Surgical categories, only certain requesters are allowed to create requisitions for these items. You create two realms. One realm grants access to all of the categories mentioned above and is assigned to the iProcurement MedSurge responsibility. The other realm grants access only to the Notepads and Writing Instruments categories and is assigned to the Internet Procurement responsibility.

Any requester who logs in using the iProcurement MedSurge responsibility has access to items in all of the categories mentioned above. A requester who logs in using the Internet Procurement responsibility has access only to items in the Notepads and Writing Instruments categories. Alternatively, or additionally, you could assign these realms to individual users.

Item Source Realms Example

Assume the following remote catalogs are defined in Oracle iProcurement:

- Exchange.Oracle.com (transparent punchout)
- Office Supplies Unlimited (transparent punchout)
- Computer Components Corporation (punchout site)

Company policy limits the purchasing of computer hardware to the Information Technology (IT) department. To adhere to this policy and restrict certain requesters from ordering these types of items, two realms are created. One realm grants access to all of the remote catalogs mentioned above and is assigned to members of the IT department. The other realm grants access only to Exchange.Oracle.com and Office Supplies Unlimited. This realm is assigned to all other requesters. You can

assign the realms to a responsibility (which assigns it to all requesters who use that responsibility), to individual requesters, or both.

Responsibility and User Access to Realms

Until you assign realms, users have access to all categories and to all punchout, transparent punchout, and informational catalogs defined in Oracle iProcurement. Once you assign a realm, the affected requester or requesters have access only to the data in the assigned realm.

Note: You can use realms either to control access to categories in the local catalog (using category realms) or to control access to a punchout, transparent punchout, or informational catalog (using item source realms). For example, you cannot restrict a user's access to categories within a punchout or transparent punchout. You cannot use realms to control access to an entire local catalog.

Realms are *additive*. For example, when you assign a realm to a responsibility, all requesters assigned that responsibility have access to that realm; however, you can assign additional realms to any of these individual requesters that only they have access to.

In the following example, both users 1 and 2 are assigned the Internet Procurement responsibility and have access to the Exchange.Oracle.com catalog. Additionally, User 2 has access to the Computer Components catalog and the Routers category.

Realm 1	Realm 2	Internet Procurement Responsibility	User 1	User 2	Result
Item Source = Exchange.Oracle.com	Item Source = Computer Components Category = Routers	Assigned to Realm 1	Not assigned additional realms	Assigned to Realm 2	User 1 has access to Exchange.Oracle.com. User 2 has access to the Exchange.Oracle.com and Computer Components catalogs and to the Routers category in the local catalog.

Setup Steps

Setting up realms consists of three basic steps:

1. Create the realm.
2. Assign the realm to a responsibility.
3. Optionally assign realms to individual users if desired.

To use realms, you must at a minimum "secure" the responsibility that the requesters use to access Oracle iProcurement. Securing a responsibility consists of entering

ICX_POR_REALM_ID in the Name field for the responsibility as described in the steps below. Next, as described in the steps below, assign a realm ID to that responsibility, to requesters (users) in that responsibility, or both, as your needs require.

If you secure a responsibility with ICX_POR_REALM_ID and do not assign a realm ID, the responsibility is "secured" against accessing any categories or item source catalogs. Anyone assigned to that responsibility does not have access to any categories or item source catalogs—until you assign a realm ID to the responsibility or user.

The table below demonstrates the following basic principles:

- *First row of the table.* If you secure a responsibility and assign no realms, requesters cannot access any catalogs or categories.
- *Second row of the table.* As soon as you assign an item source realm to a responsibility, the requester has access to that realm and all categories. In other words, assigning an item source realm at the responsibility level "adds back" access to all categories, and vice versa. (If you assign a category realm to a responsibility, the requester has access to those categories and all item source realms.) This behavior preserves similar behavior from previous releases.
- *Third row of the table.* If you secure a responsibility and assign a realm at the user level, the requester has access to nothing except the user-assigned realm.
- *Fourth row of the table.* If you assign an item source realm to a responsibility and a category realm to the user, the user-level realm is ignored. Assigning an item source realm to a responsibility frees up access to all categories, so adding a category realm at the user level is redundant. (Likewise, if you assign a category realm to a responsibility and an item source realm to the user, the user-level realm is ignored.)

Examples of Secured Responsibilities and Realms

Securing Attribute for Responsibility	Responsibility Realm	Securing Attribute for User	User Realm	Result
ICX_POR_REALM_ID	None assigned	None assigned	None assigned	Assuming the requester logs on using the secured responsibility, the requester cannot access any catalogs or categories.
ICX_POR_REALM_ID	Item Source = Exchange.Oracle.com	ICX_POR_REALM_ID	Item Source = Office Supplies Unlimited	Requester can access the Exchange.Oracle.com and Office SuppliesUnlimited catalogs and all categories. (Assigning the item source realm at the responsibility level frees up access to all categories.)

Securing Attribute for Responsibility	Responsibility Realm	Securing Attribute for User	User Realm	Result
ICX_POR_REALM_ID	None assigned	ICX_POR_REALM_ID	Item Source = Exchange.Oracle.com	At the responsibility level, ICX_POR_REALM_ID secures against access to any catalog or category. Since the requester is assigned a realm that contains the Exchange.Oracle.com catalog, however, the requester has access to that catalog. Since the requester is not assigned a category realm, the requester has no access to any categories (no access to local content).
ICX_POR_REALM_ID	Item Source = Office Supplies Unlimited	ICX_POR_REALM_ID	Category = Computers	Requester can access the Office Supplies Unlimited catalog and all categories in the local catalog. Since category realms are not restricted at the responsibility level (and realms are additive), the user-level category realm is ignored.

Create the Realm:

To create a realm:

1. Log in to Oracle Purchasing and use the following navigation path to open the Realms window: Setup > E-Catalog Admin > Realms.
2. In the Realms window, enter your own Name and Description for the realm.

Realms Window



3. Select either of the following as the Component Type:
 - Item Source, to define a realm for a punchout, transparent punchout, or informational catalog.
 - Category, to define a realm for categories in the local catalog.
4. In the Components section, use the list of values (LOV) to select the catalog or category to which anyone assigned this realm has access.
5. Save your changes.
6. Note the Realm ID that is automatically assigned to the realm. You will need to reference this ID later.

Assign the Realm to a Responsibility:

To assign the realm to a responsibility:

1. Log on to Oracle Applications using the System Administrator responsibility.
2. Open the Responsibilities window using the following navigation path: Security > Responsibility > Define.
3. Query the responsibility to which you will assign the realm.

Responsibilities Window

Responsibility Name: **IPG iProcurement**

Application: **Oracle Self-Service Web Applications**

Responsibility Key: **IPG_IP_PROJ**

Description: **IPG iProcurement**

Effective Dates: From: **25-FEB-2002**, To:

Available From:

- Oracle Applications
- Oracle Self Service Web Applications
- Oracle Mobile Applications

Data Group:

Name: **Standard**

Application: **Oracle Self-Service Web Applicati**

Menu: **Internet Procurement Home**

Web Host Name:

Web Agent Name:

Request Group:

Name:

Application:

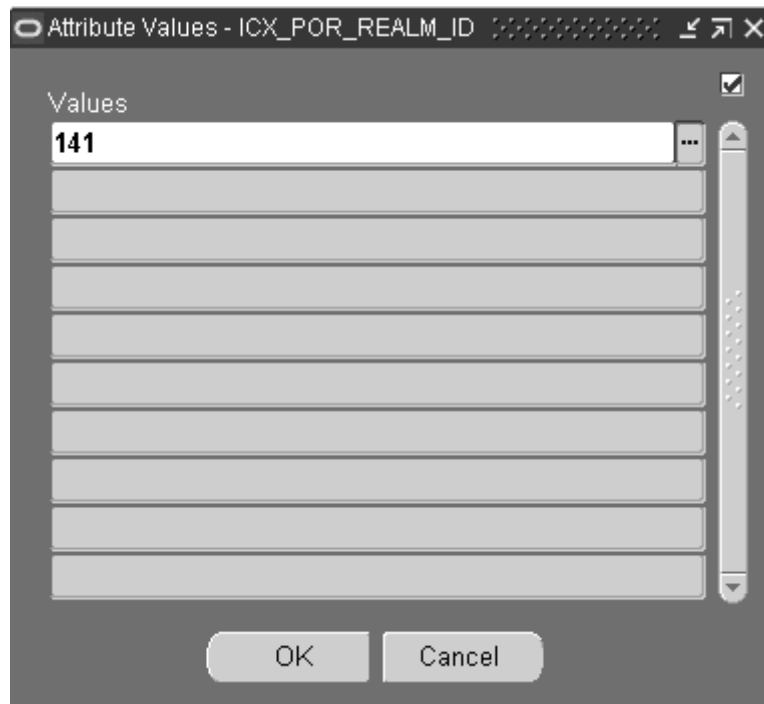
Menu Exclusions | **Excluded Items** | Securing Attributes

Name	Application
ICX_POR_REALM_ID	Oracle Self-Service Web Applications

Values...

4. In the Securing Attributes tabbed region, in the Name field, use the LOV to select **ICX_POR_REALM_ID**.
5. Choose the Values button.
6. In the Values fields, enter the Realm ID that you noted earlier for each realm you want to assign to this responsibility.

Realm ID in Attribute Values Window



7. Click OK.
8. Save your changes.
9. Repeat these steps for each responsibility to which you want to assign the realms.

Assign the Realm to Users (Optional):

To assign the realm to users:

1. Log on to Oracle Applications using the System Administrator responsibility.
2. Open the Users window using the following navigation path: Security > User > Define.
3. Query the user (person) to whom you want to assign the realm.
4. In the Securing Attributes tabbed region, in the Attribute field, use the LOV to select ICX_POR_REALM_ID.

Users Window

Attribute	Application	Value
ICX_POR_REALM_ID	Oracle Self-Service Web Appl	465

5. For the Value, enter the Realm ID that you noted earlier for the realm you want to assign to the user.
6. In the Securing Attributes tabbed region, create a line for each realm you want to assign to the user. Select ICX_POR_REALM_ID in the Name field and the Realm ID for each realm.
7. Save your work.

Profile Options

None

Data Security

The following securing attribute applies to this feature:

- ICX_POR_REALM_ID assigned at the responsibility level. It can also be assigned at the user level, if the realm is assigned to a user.

Implementation Considerations

Categories restricted by realms display to requesters when browsing categories; however, the items in those categories do not display. Category realms restrict access to items in the excluded categories.

If you are upgrading from a previous release, the following securing attributes from the previous release continue to work:

- RT_CATEGORY_ID assigned at the responsibility level (for category realms).

- ICX_POR_ITEM_SOURCE_ID assigned at the responsibility level (for item source realms).

You can use the new securing attribute, ICX_POR_REALM_ID, along with previous securing attributes you implemented.

Note: Going forward, it is recommended that you use ICX_POR_REALM_ID.

Setting Up Non-Catalog Request Templates

Requesters may want to procure an item or service that is not found in the catalog. For these cases, they can use a non-catalog request. The non-catalog request offers the ability to add an item or service to the shopping cart based on a description of the item or service.

Entering a Non-Catalog Request

The figure above shows the non-catalog request that requesters can enter. In the Item Type field, requesters can enter goods billed by quantity, service billed by quantity, or goods or services billed as an amount.

By default, Oracle iProcurement provides the standard non-catalog request shown above, of the Request Type *New*. The catalog administrator, however, can create multiple non-catalog request templates. For example, you can create a Computer Services request template and an Office Services request template. Both request templates will display in the Request Type drop-down menu for the requester to select from.

If you wish to use the single, standard non-catalog request template that Oracle iProcurement provides, you do not need to perform any setup other than the profile options mentioned below.

Setup Steps

Set profile options (required):

Set the three line types profile options listed in Profile Options, page 4-57.

Define commodities (optional):

If desired, you can define commodities for use by the non-catalog request template. Commodity is a display-only field on the non-catalog request template that defaults based on the category selected. (See the later figure, *Creating a Non-Catalog Request Template*.) Define commodities if you want to provide a default category on the template, and you want to restrict the requester to choose only categories within that commodity. For example, for a Computer Services non-catalog request, requesters can only select categories in the Technical Services commodity. (Alternatively, you can enter a default category in the template and make the Category field non-editable.)

Note: The requester may actually see only a subset of the categories in that commodity if those categories are inactive, inaccessible to the requester due to realms, or other reasons.

Commodities are groupings of categories. Use commodities to group categories that you have already defined in the Purchasing Category set in Oracle Purchasing. You can place only Purchasing categories in these commodities.

For example, you create the commodities Filters and Brakes to group the following Purchasing categories already defined in Oracle Purchasing:

Example Commodities and Categories

Commodity	Purchasing Category	Category Code in Oracle Applications
Filters	Air Filters	AIR.FIL
Filters	Oil Filters	OIL.FIL
Brakes	Brake Shoes	SHOES.BRAKES
Brakes	Brake Pads	PADS.BRAKES
Brakes	Brake Foundations	FOUND.BRAKES

Note: You cannot create a hierarchy of commodities. Only one commodity level, just above the category level, is supported.

Commodities are visible across all operating units and organizations.

A category cannot belong to more than one commodity.

To define commodities:

1. Log on to Oracle Applications using one of the following responsibilities:
 - iProcurement Super User
 - Purchasing Super User
 - Public Sector Purchasing Super User
2. Use the following navigation to access the Commodities setup page: Setup > Items > Commodities > Commodities.

Note: If you do not find the Commodities menu, then you may be logged on with a customized responsibility. The system-provided Purchasing Super User responsibility comes with the Commodities menu built in. Use the system-provided responsibility if you cannot find the Commodities menu.

3. On the **Commodities** page, click Create Commodity.
4. On the **Create Commodity** page, enter the following:
 - *Commodity Code.* A unique identifier for the commodity, such as IT or 01. This identifier is the same in all languages. The maximum length of this field is 120 bytes or approximately 40 English characters. You cannot use the same code for more than one commodity; each code must be unique. (You can use the same code that is used for a code segment in Oracle Applications.)
 - *Name.* Commodity name, such as Information Technology, that displays in the reports. The maximum length of this field is 240 bytes or approximately 80 English characters. The name must be unique within a given language.
 - *Description.* Optional description, for your own purposes. The description does not display in the reports.

Note: You cannot delete commodities. Inactivating commodities does not remove them from the non-catalog request. Be sure to create only the commodities you need. You can add, update, and split commodities any time, and the changes are reflected immediately.

5. Make sure that Active is selected.

You can assign categories only to active commodities. (You can make all other changes, such as removing categories and changing person assignments, to active or inactive categories.)

Both active and inactive commodities display in the non-catalog requests.

Create Commodity Page

[Commodities](#) >

Create Commodity

* Indicates required field

* Commodity Code

* Name
(Example: Office Supplies, Computers...)

Description

Active

Select Categories: |

|

Select Category Code	Category Description
<input type="checkbox"/> 280.90	Weatherproof Cables and Wires
<input type="checkbox"/> 060.60	Hose and Hose Fittings

6. Assign the desired categories to your commodity:

- Click **Assign Categories**.
- On the **Assign Categories** page, optionally enter search criteria and click **Go**.

You can search on the Category Description or any of its category code (flexfield structure) segments. For example, your company created a two-segment structure in Oracle Applications. The first segment is the Item Category, and the second is the Commodity. An example is 451.01, where 451 is the Item Category and 01 is the Commodity. In this example, the **Assign Categories** page displays the following search fields: Category Description, Item Category, and Commodity.

In this example, assume that 01 indicates the Filters commodity. Enter 01 in the Commodity search field to return all category codes that contain 01 in their Commodity flexfield segment.

Note: If Enforce List of Valid Categories is checked in the Category Sets window in Oracle Applications, then only the categories listed in that window for the Purchasing Category set are available for assignment to a commodity. If Enforce List of Valid Categories is not checked, then any category that uses the same flexfield structure as the Purchasing Category set is available for assignment.

When searching, enter the first part of the name or code, or use a wildcard (%). For example, entering *pro* searches for categories that begin with

pro. Entering *%pro%* searches for categories that contain *pro*. The search is case insensitive.

- Select the categories you want to assign to this commodity.

Clicking "Select All" selects only the categories on that page. If more results are displayed on additional search results pages, you must click "Select All" on each page.

- Click Apply.

If you assign a category that is already assigned to another commodity, the category is moved from that commodity to this one. (If the category is already assigned to a commodity that you are editing, it does not appear in the search results.)

7. Click Apply.
8. You do not need to perform the Assign Person functionality to use commodities with non-catalog requests.

Define non-catalog request template (optional):

Define non-catalog request templates if you do not want to use the standard non-catalog request that Oracle iProcurement provides.

1. Log on using the Internet Procurement Catalog Administration responsibility.
2. In the eContent Manager, expand "Manage Content."
3. Click "Non-Catalog Request Templates."
4. On the **Manage Non-Catalog Request Templates** page, click Create.

Creating a Non-Catalog Request Template

eContent Manager [Home](#) [Logout](#) [Preferences](#) [Help](#)

Create Non-Catalog Request Template

* Indicates required field

* Template Name

* Organization Changing organization will remove all supplier related information.

* Item Type

Default Item Information

Item Description	<input type="text"/>	<input checked="" type="checkbox"/> User Editable
Category	<input type="text" value="CAPITAL COMPUTER..."/>	<input checked="" type="checkbox"/> User Editable
Commodity	<input type="text" value="3329383 NEW COM SEN &"/>	<input checked="" type="checkbox"/> Restrict categories to above commodity
Amount	<input type="text"/>	<input checked="" type="checkbox"/> User Editable
Currency	<input type="text" value="USD"/>	<input checked="" type="checkbox"/> User Editable

5. For detailed guidance on all fields in the template, click the Help link on the **Manage Non-Catalog Request Templates** page.

Note: Categories that you specify in the template, or that the requester chooses in the template, do not have to be Enabled for iProcurement in the Categories window in Oracle Purchasing.

6. You can decide whether to restrict suppliers in your template.
 - If you select No in the Restrict Suppliers field, then the list of suppliers that requesters can choose from is limited only to those whose supplier sites are valid in the requester's operating unit.
 - If you select Category ASL, then the list of suppliers that requesters can choose from is additionally limited to those suppliers that exist in the approved supplier list (ASL) in Oracle Purchasing, for the selected category. (The ASL in Oracle Purchasing calls the category a "commodity.")
7. If desired, you can also assign information templates to your non-catalog request template. See the online Help for details. See also Information Templates, page 5- 6 .
8. Assign your non-catalog request template to a store, as described in the steps below.

Note: You must assign your template to a store for it to be visible to requesters.

Assign non-catalog request template to a store (required):

If you created a non-catalog request template, you must assign it to a store for it to be visible to requesters. Assign it to either of the following stores:

- Non-catalog Request Store. This store is provided by default, by Oracle iProcurement. This store does not behave like other stores; it does not display on the **Shop** home page for the requester to search in or select. Instead, when a requester clicks Non-Catalog Request directly below the Shop tab, the default non-catalog request store is used behind the scenes to house that request. If you assign multiple templates to this store, then requesters can choose any template that has been assigned to their operating unit (Organization) from the Request Type drop-down menu.
- A non-catalog request store that you create. You can create a non-catalog request store that displays on the **Shop** home page along with other stores. For example, you can create a store called Non-Catalog Services. When requesters click the store, they can choose (from the Request Type drop-down menu) any one of the non-catalog request templates that you created and assigned to the store, provided that the template has been assigned to the requester's operating unit (Organization).

To assign your template to a store:

1. Log on using the Internet Procurement Catalog Administration responsibility.
2. In the eContent Manager, expand "Manage Content."
3. Click "Stores."
4. See the online Help for non-catalog requests and for stores, for additional instructions.

Note: Your store must have a Type of Non-Catalog.

Profile Options

See Set Profile Options, page 2-38 for complete profile setup instructions. To use each of the possible item types, three profile options must be set:

1. POR: Goods Line Type

This profile determines the line type for goods billed by quantity in non-catalog requests. The value selected here must be distinct from the values selected for the other line types profile options (see 2 and 3). You can select only line types with a Purchase Basis of Goods and a Value Basis of Quantity for this profile option.

2. POR: Rate Based Services Line Type

This profile determines the line type for services billed by quantity in non-catalog requests. The value selected here must be distinct from the values selected for the other line types profile options (see 1 and 3). You can select only line types with a Purchase Basis of Goods and a Value Basis of Quantity for this profile option.

3. POR: Amount Based Services Line Type

This profile determines the line type for amount-based non-catalog requests. The value selected here must be distinct from the values selected for the other line types profile options (see 1 and 2). You can select only line types with a Purchase Basis of Services and a Value Basis of Amount for this profile option. If Oracle Services Procurement is licensed and implemented, then you can select a Value Basis of Fixed Price or Amount.

Note: It is possible to have unit values defaulted onto the non-catalog request based on the line type. In order to do this, associate a unit of measure with the line type in Oracle Purchasing.

Function Security

If you want to hide access to the standard non-catalog request template that Oracle iProcurement provides, exclude the submenu iProcurement: Non-catalog Request (ICXPOR_NONCATALOG) from the Internet Procurement Home menu when defining users' responsibilities.

Workflow

The PO Create Documents workflow can be configured to automatically source non-catalog requests from a contract. The attribute name that controls this option is *Should non-catalog requests be autosourced from contract?* If set to Yes, then if a valid contract purchase agreement exists for the given supplier, a purchase order referencing that contract will be automatically created. The default value for this attribute is No. See information about the PO Create Documents workflow in *Customize Workflows*, page 2-22 for details.

Implementation Considerations

When you create a non-catalog request template, you must create it for a specific Organization (operating unit). When you create a store, you can assign the store to all or specific operating units. Oracle iProcurement uses both operating unit assignments to determine whether the non-catalog request template displays to a requester.

For example:

- A non-catalog request store is assigned to the Vision Operations operating unit. The store contains two non-catalog request templates: Template 1, for Vision Operations, and Template 2, for Vision Services. In this example, a requester in Vision Operations sees only Template 1.

- A non-catalog request store is assigned to Vision Spain. The store contains one non-catalog request template, which is created for Vision Operations. A requester in Vision Spain does not see this store at all.

Requisitions Setup

This chapter describes the implementation steps specific to requisitioning (ordering) in Oracle iProcurement.

This chapter covers the following topics:

- Requisitions Setup Checklist
- Foreign Currency Support
- Information Templates
- Suggested Buyer
- One-Time Address
- Purchase Order Grouping for Requisition Lines with One-Time Addresses
- Hazard Information
- Global Requester
- Express Setup Tool
- Charge Account Displays
- Expense Charge Account Rules
- Employee P-Cards
- Supplier P-Cards
- Purchase Order (PO) Extract for P-Card Reconciliation
- Project Accounting
- Grants Accounting
- Estimated Tax Functionality
- Favorite Charge Accounts
- Approvals
- Global Approver
- Requisition Changes
- Requester-Initiated Changes to Purchase Orders
- Requisition Cancellations
- Lifecycle Tracking

- Internal Requisitions
- Oracle Services Procurement

Requisitions Setup Checklist

Use the following checklist for all setup related to requisition creation and management. The steps are organized by functional area. For example, all steps that have to do with setting up delivery information on requisitions are listed together. This is a checklist of all setup steps in this chapter. These steps are listed in a suggested, but not required, order.

Requisitions Setup Checklist

Number	Step	Functional Area	Required or Optional	Information Source
1	Foreign Currency Support	Shopping	Optional	Foreign Currency Support, page 5-4
2	Information Templates	Shopping	Optional	Information Templates, page 5-6
3	Suggested Buyer	Delivery	Optional	Suggested Buyer, page 5-10
4	One-Time Address	Delivery	Optional	One-Time Address, page 5-11
5	Purchase Order Grouping for Requisition Lines with One-Time Addresses	Delivery	Optional	Purchase Order Grouping for Requisition Lines with One-Time Addresses, page 5-12
6	Hazard Information	Delivery	Optional	Hazard Information, page 5-15
7	Global Requester	Delivery	Optional	Global Requester, page 5-16
8	Express Setup Tool	Delivery	Optional	Express Setup Tool, page 5-18
9	Charge Account Displays	Billing	Optional	Charge Account Displays, page 5-21
10	Expense Charge Account Rules	Billing	Optional	Expense Charge Account Rules, page 5-23

Number	Step	Functional Area	Required or Optional	Information Source
11	Employee P-Cards	Billing	Optional	Employee P-Cards, page 5-24
12	Supplier P-Cards	Billing	Optional	Supplier P-Cards, page 5-25
13	PO Extract for P-Card Reconciliation	Billing	Optional	PO Extract for P-Card Reconciliation, page 5-35
14	Project Accounting	Billing	Optional	Project Accounting, page 5-40
15	Grants Accounting	Billing	Optional	Grants Accounting, page 5-41
16	Estimated Tax Functionality	Billing	Optional	Estimated Tax Functionality, page 5-41
17	Favorite Charge Accounts	Billing	Optional	Favorite Charge Accounts, page 5-43
18	Approvals	Approval	Required if you have not implemented Oracle Purchasing	Approvals, page 5-44
19	Global Approver	Approval	Optional	Global Approver, page 5-54
20	Requisition Changes	Requisitions	Optional	Requisition Changes, page 5-54
21	Requester-Initiated Changes to Purchase Orders	Requisitions	Optional	Requester-Initiated Changes to Purchase Orders, page 5-56
22	Requisition Cancellations	Requisitions	Optional	Requisition Cancellations, page 5-60
23	Lifecycle Tracking	Requisitions	Optional	Lifecycle Tracking, page 5-61

Number	Step	Functional Area	Required or Optional	Information Source
24	Internal Requisitions	Requisitions	Optional	Internal Requisitions, page 5-65
25	Oracle Services Procurement	Requisitions	Optional	Oracle Services Procurement, page 5-70

Foreign Currency Support

Each time a requester searches for an item in a catalog, the search can display the currency associated with that item. This currency can be any valid currency defined in the application, including the functional currency. Similarly, a non-catalog request can be made in any valid currency. Once these items are added to the shopping cart, the application converts the price for that item into the functional currency using the relevant exchange rate, and then displays the functional currency throughout the application.

The foreign currency feature provides the ability to display the foreign currency price along with the functional currency price on key screens in the application.

The foreign currency can be displayed on the following pages:

- Shopping Cart
- Approver Shopping Cart
- Edit Single Account
- Edit Multiple Accounts
- Review Charge Accounts
- Edit Lines - Delivery information
- Edit Lines - Billing information
- Review and Submit - expand line details
- Printer-friendly page
- Approval Notification
- Approval Notification Reminders
- Requisitions: click requisition - click Details icon - expand line details

Setup Steps

Decide whether to display the transaction currency price to requesters during checkout. Use Oracle Applications Framework personalization to display or hide the field.

Transaction and Functional Currency in Shopping Cart

Shopping Cart

Line	Item Description	Special Info	Unit	Quantity	Price	Price (USD)	Amount	Amount (USD)	Delete
1	Rollerball Pen		EA	1	1.89 USD	1.89	1.89 USD	1.89	
2	Palm Pilot		EA	1	550.00 USD	550.00	550.00 USD	550.00	
3	Rollerball Pen French		EA	1	1.89 FRF	0.31	1.89 FRF	0.31	
4	Press Binder French		EA	1	0.43 FRF	0.07	0.43 FRF	0.07	
Total								552.26	

I need a purchase order number immediately
 TIP Purchase Order number will be assigned after completing checkout.

[Return to Shopping](#)

The figure above shows the shopping cart displaying the price in the transaction currency and in the functional currency. The following table shows the default settings of transaction and functional prices and amounts in the shopping cart:

Price and Amount Fields by Default

Field Name	Personalization Name	Displayed or Hidden by Default?
Transaction Currency Price	Price	Displayed by default
Functional Currency Price	FuncPrice	Hidden by default
Transaction Amount	TxnAmountFlow	This field cannot be personalized
Functional Amount	FuncAmount and TxnAsFuncAmount	This field cannot be personalized

If you do not wish to accept the defaults for Transaction Currency Price and Functional Currency Price, then use Oracle Applications Framework personalization to change them. See Personalize Oracle iProcurement Using Oracle Applications Framework, page 2-18.

If you want your changes to apply to the **Review and Submit** page of the checkout process, additionally apply your personalizations to that page as well.

Note: The Transaction Amount is hidden if the transaction currency is the same as the functional currency for all lines in the cart; it is shown if

there is at least one foreign currency line. The Functional Amount always displays. Therefore, these fields cannot be controlled by personalization.

Profile Options

None

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Information Templates

You may set up information templates to gather additional information in Oracle iProcurement to pass necessary order processing information to suppliers. When an information template is assigned to a category or item, the application prompts requesters to provide the information specified in the template when the item is added to the shopping cart. This information becomes a line-level attachment to the requisition.

For example, you can implement information templates for items like business cards that require additional information (name, address, e-mail, phone) from the requester. Oracle iProcurement will then prompt for name, address, e-mail, and phone number when you order business cards. Each information template must be associated with an Oracle Purchasing item or item category. If an information template is associated with an item category, all items belonging to that category are also associated with the template.

Information Template Fields in Oracle iProcurement

ORACLE iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Shop Requisitions Receiving Contractors

Stores | Categories | Shopping Lists | Non-Catalog Request | Contractor Request

Special Information

* Indicates required field [Continue](#)

Selected Line

Your selection requires special information.

Description	Unit	Quantity	Price	Amount (USD)	Supplier
Console Interface	Each	1	150.00 USD	150.00	

Additional Console Information

* Body Color Classic or Standard

* Small, Medium, Large

Origin

* Country of origin

[Continue](#)

The figure above shows how the information template fields display, on the **Special Information** page. (In this example, two templates were associated with the item - Additional Console Information and Origin - perhaps one template for the item and another for the category.) The **Special Information** page appears when the requester adds the item to the cart.

Setup Steps

Create an information template:

1. Navigate to the Define Information Template window. From the Oracle Purchasing menu, select Setup > Information Templates.

2. Give your Template a name.

This name appears as a heading just above the template fields during checkout (Additional Console Information and Origin in the example above).

3. Select Available in All Organizations if you want the template to be available to requesters in all operating units. Leave this option unselected if you want the template to be available only to requesters in the same operating unit in which you are creating the information template.

For example, you are logged in with a responsibility that is tied to the Vision France operating unit. If you leave this option unselected, then your information template is available only to people in your French operating unit.

4. Select an Attachment Category of To Supplier or To Buyer.

To Buyer means that the requisition, when turned into a purchase order, displays the information template as an attachment to the buyer. To Supplier means that the information template also displays as an attachment to the supplier.

5. Enter an Attribute Name and Description. The Attribute Description is the actual field prompt that is displayed in Oracle iProcurement. The window is displayed below:

Define Information Template Window

Template: **Additional Console Inf** Available In All Organizations
Attachment Category: **To Supplier**

Seq	Attribute Name	Attribute Description	Default Value	LOV	Mandatory	Enabled
5	Color	Body Color			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Size	Small, Medium, Large			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15	Style	Classic or Standard			<input type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Associate Template

If you use Multilingual Support (MLS), translations can be entered for the following fields: Template, Attribute Name, Attribute Description, and Default Value. To enter the translations, select Translations from the View menu. For more information, see the *Oracle Applications User's Guide*.

6. Optionally, enter a default value to automatically appear in the field.
For example, for an Attribute Name of Body Color, the default value could be Black.
7. If you want the template field to be a pop-list (drop-down menu) of values from which the requester selects, see the steps for creating pop-lists below.
8. Indicate whether the field is mandatory for Oracle iProcurement requesters. If the field is mandatory, requesters will be required to enter a value in the field before proceeding to complete the requisition.
9. Indicate whether to activate the attribute to actually display in Oracle iProcurement. In certain circumstances, you may want to define an attribute, but delay enabling it for display.
10. Choose Associate Template to associate the template with an item or item category. The Information Template Association window appears. This window is displayed below:

Information Template Association Window

Type	Item Number	Item Category
Item Category	AS00005	LAB.EQUIP...

Close

11. Select the type of association (Item Number or Item Category) to associate with the template.
12. If you selected Item Number, enter the number. If you selected Item Category, enter the category.
13. Save your work.

Create pop-lists:

Follow these steps if you want your template fields to be a drop-down menu of valid values. For example, you create a Country of Origin field. Instead of letting the requester enter any value, you provide a drop-down menu that contains only the values Canada, US, and Mexico.

For more details on the following steps, see the *Oracle Applications Flexfields Guide*.

1. Log in to Oracle Purchasing.
2. Use the following navigation: Setup > Flexfields > Validation > Sets.
3. Create a flexfields validation set that satisfies the following criteria:
 - Format Type is Char, and Maximum Size is less than or equal to 240.
 - Validation Type is either Independent or Translatable Independent.
 - List Type is any of the provided options.
4. Use the following navigation: Setup > Flexfields > Validation > Values.
5. Search for the validation set name that you just created and add values to it.

For example, your validation set is Country of Origin, and the values are Canada, US, or Mexico.

6. Access the Information Templates window as described above, in the instructions for defining information templates.
7. In the LOV field, select your validation set name.
8. Save your work.

Profile Options

None

Function Security

None

Implementation Considerations

If information templates are created for both the item and a category that it belongs to, then both templates apply to that item.

The information template is also accessible through a Special Information link in the cart, if the requester wishes to update the fields after initially adding the items to the cart.

Information Templates for Each Line

Shop Requisitions Receiving Contractors

Shopping Cart

Line	Item Description	Special Info	Unit	Quantity	Price	Amount	Amount (USD)	Delete	Source Document Number	Line Type
1	Rollerball Pen French		EA	<input type="text" value="1"/>	1.89 FRF	1.89 FRF	0.31			Goods
2	Press Binder French		EA	<input type="text" value="1"/>	0.43 FRF	0.43 FRF	0.07			Goods
3	Console Interface	Multiple	Each	<input type="text" value="1"/>	150.00 USD	150.00 USD	150.00			Goods
4	RAJU IPCT ITEM	Origin	Each	<input type="text" value="1"/>	50.00 USD	50.00 USD	50.00			Goods
Total							200.37			

I need a purchase order number immediately
 TIP Purchase Order number will be assigned after completing checkout.

Return to Shopping

The figure above shows how information templates are associated with multiple lines in a cart, through the Special Information column. (The Special Information column displays by default.)

Suggested Buyer

As requisitions are created in Oracle iProcurement, it is possible to indicate the suggested buyer for each requisition and requisition line. A buyer can be defined on any of the following:

- Blanket purchase agreement or quotation
- Requisition template
- Item

- Category

If a buyer is found on any of the above, then it will be defaulted onto the corresponding purchase requisition based on its position in the document hierarchy expressed above. The Oracle iProcurement requester may accept this default or override it based on the list of buyers in the Suggested Buyer field on the requisition. This suggested buyer information is then passed to the resulting purchasing document and may be overridden during the document creation process.

Setup Steps

None

Profile Options

The profile option HR: Cross Business Groups allows buyers to be defaulted from other business groups. Set this profile option as desired. See Set Profile Options, page 2-38 for complete profile setup instructions.

Function Security

None

Workflow

The Get Buyer process of the PO Create Documents workflow retrieves buyer information for the purchase order when it is being created. For standard purchase orders, this process will retrieve the buyer from the requisition line (through the Get Buyer From Req Line function). If no buyer is defined at the requisition level, then the item master, category, source document, and contract are subsequently checked. When a blanket release is created, the buyer will be retrieved from the blanket agreement, regardless of the buyer defined on the associated requisition.

Implementation Considerations

When the profile HR: Cross Business Groups is set to Yes:

- When using the Category to determine the default buyer, Oracle iProcurement will cross business group boundaries when selecting the default buyer.
- The list of values for the Suggested Buyer field crosses business groups, enabling the user to select an employee from another business group as the suggested buyer.

One-Time Address

There are occasions when requesters want items delivered to a location, such as a home address, that is not an office location or other predefined location established in the database. This is considered a one-time address and can be defined as a deliver-to location. This feature enables users to specify a one-time address on a requisition line during the checkout process. The one-time address can be associated with individual requisition lines or with all requisition lines on a given requisition. One-time locations associated with requisition lines will then be displayed as a line-level attachment on the resulting purchase order.

Setup Steps

To set up a default one-time address:

1. Set up a dummy HR location that would be used as the deliver-to location on the requisition line, whenever the requester specifies a one-time location. When defining this location, it may or may not be associated with an organization. If it is associated with an organization, then a distinct location must be defined for every organization. This location can be set up using the Location window accessible from the Purchasing menu (Setup > Organizations > Locations).
2. Set the value of the profile POR: One Time Location to be equal to the name of the location created in step 1. This profile value can be set at the site, responsibility, or user level.
3. By default, a single text entry box is provided to enter the address details. Use Oracle Applications Framework personalization if you want to configure the address so that individual address lines can be presented and displayed accordingly. See *Personalize Oracle iProcurement Using Oracle Applications Framework*, page 2-18.

Profile Options

POR: One Time Location must be set to a location that has been previously defined in the Location window.

Function Security

Access to this functionality can be restricted using menu function security. Under Menu Exclusions, exclude the function One Time Location. See *Function, Menu, and Data Security*, page 2- 8 for details on function security setup.

Workflow

None

Implementation Considerations

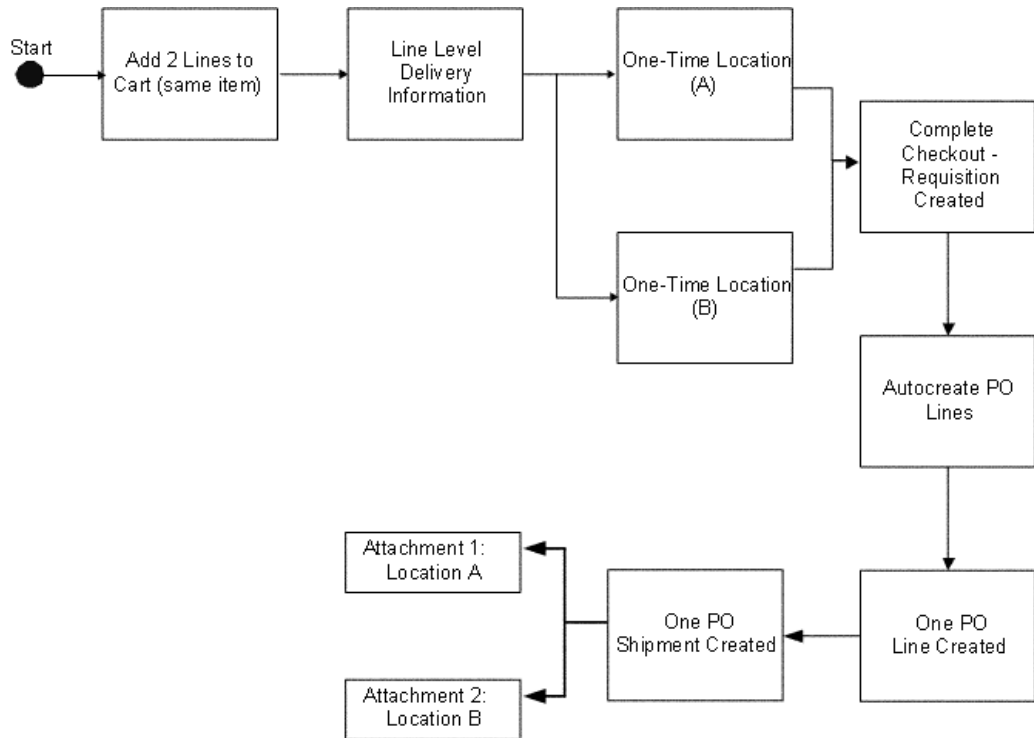
No additional considerations.

Purchase Order Grouping for Requisition Lines with One-Time Addresses

As requisitions are created in Oracle iProcurement, it is possible to assign one-time addresses as the deliver-to locations for each line. One-time locations (delivery addresses) are used when requesters want their items to be delivered to a location that has not been previously defined (and most likely will not be used again). Individual requisition lines can be delivered to distinct and separate one-time locations. Each one-time location is represented on the resulting purchase order line as an attachment.

In the case where the same item is found on two or more requisition lines, each with a separate one-time delivery address, the buyer or requester may not want these two (or more) requisition lines to be grouped onto the same purchase order line since there could be some confusion as to the quantity to be delivered to each location. The figure below details the requisition-to-purchase order process when one-time locations are employed:

One-Time Location on Requisitions and Purchase Orders



As requisition lines are converted into purchase order lines, multiple requisition lines are grouped onto one purchase order line if certain characteristics, such as item and unit of measure, are the same. If one-time locations are associated with the requisition lines, each one-time location is represented on the resulting purchase order line as an attachment. The main functional elements of the one-time location grouping functionality are detailed below.

Grouping Options

Attributes in the PO Create Documents Workflow control the grouping feature and provide the requester the ability to *not* group requisition lines that contain one-time locations. The workflow looks at the available requisition lines to be converted into purchase order lines and first determines the value of these attributes to determine if requisition lines with the same data will be grouped.

The two workflow attributes are *Is Grouping of Requisition Line Allowed?* and *Is Grouping of One Time Address Line Allowed?* Each of these attributes can have a value of Yes or No. Depending on the value selected, the workflow PO Create Documents will behave differently:

- If the attribute *Is Grouping of Requisition Line Allowed?* is set to No, then no requisition lines are consolidated into a single purchase order line.
- If grouping is set to occur, but *Is Grouping of One Time Address Line Allowed?* is set to No, then requisitions with one-time locations will not be grouped.
- If both attributes are set to Yes, then all similar requisition lines, even those with one-time locations will be consolidated onto a single purchase order line. The default values for both attributes is Yes.

Note: When the attribute *Is Grouping of One Time Address Line Allowed?* is set to No, then no grouping of requisition lines with one-time locations will occur, even if the one-time addresses are the same.

The internal names of the above attributes are GROUPING_ALLOWED_FLAG and GROUP_ONE_ADDR_LINE_FLAG, respectively.

Append Quantity and UOM to Attachment

As one-time locations are converted and displayed as attachments for the purchase order lines, these text attachments will now include the following information (for one-time location text attachments only):

- Unit of Measure (UOM)
- Quantity Ordered
- Location

As an example, the text of an attachment reads as follows:

Please ship 30 (Each) to:

100 Mason St.

Palo Alto, CA

95320

Setup Steps

1. Access the PO Create Documents Workflow. See *Customize Workflows*, page 2-22.
2. Find the workflow attributes *Is Grouping of Requisition Line Allowed?* and *Is Grouping of One Time Address Line Allowed?*
3. To modify the grouping logic, change the values of these attributes from Yes to No. Yes is the defaulted value for both attributes. The following table details the results of the various attribute setting combinations:

One-Time Location Grouping Attributes

Is Grouping of Requisition Line Allowed?	Is Grouping of One Time Address Line Allowed?	Result
YES	YES	All similar requisition lines will be grouped regardless of the existence of one-time locations.
YES	NO	Similar requisition lines will be grouped unless a one-time location is found on the requisition line.
NO	YES	No grouping of requisition lines will ever occur.
NO	NO	No grouping of requisition lines will ever occur.

Profile Options

POR: One Time Location must be set. See Set Profile Options, page 2-38 for complete profile setup instructions.

Workflow

The PO Create Documents workflow looks at the two attributes *Is Grouping of Requisition Line Allowed?* and *Is Grouping of One Time Address Line Allowed?* when determining if requisition lines should be grouped onto a single purchase order line.

Implementation Considerations

- The automatic grouping logic only applies to the workflow PO Create Documents. When creating purchase documents through the Autocreate window, the buyer always has the ability to control the grouping function.
- The profile POR: One Time Location must be properly set in order for one-time locations to be used within Oracle iProcurement.
- If the first workflow attribute *Is Grouping of Requisition Line Allowed?* is set to No, then no grouping will occur, regardless of the setting of *Is Grouping of One Time Address Line Allowed?*

Hazard Information

Hazard information can be indicated for each line item of a requisition. As requisitions are created in Oracle iProcurement, both a hazard identification number and a hazard class can be associated with a requisition line. Further, if an item already has a hazard identification number or a hazard class linked to it, either from a source document or the item master, then this default information will be passed on to the resulting requisition line. The hazard information consists of a hazard ID number (known as the UN Number) and a Hazard Class. This information can be entered or modified on the requisition line delivery information.

Setup Steps

By default, the hazard fields are hidden. If you want to display them, use Oracle Applications Framework. See Personalize Oracle iProcurement Using Oracle Applications Framework, page 2-18.

Profile Options

None

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Global Requester

Oracle iProcurement enables requisition preparers to create requisitions on behalf of another requester, even if that requester is in a different operating unit or business group. For example, a manager in the United Kingdom can order office supplies for a newly hired employee in the United States, even though the UK and the US represent different business groups. There can be two scenarios:




- *Global preparer.* The manager in the UK logs on using the US responsibility. Even though the manager is not part of the US business group, she can create a requisition for a US employee.
- *Global requester.* The manager in the UK logs on using the US responsibility and picks herself as the requester, even though she is not an employee in the US business group. For example, the manager is traveling to the US and needs to order supplies while in the US.

The resulting requisition is routed for approval based on the preparer's approval path, when an employee/supervisor hierarchy is used. When a position hierarchy is used and the preparer or approver belongs to a different business group than the requester, then the preparer or approver must manually select an approver for the requisition. (The workflow cannot generate an approval list in this scenario.)

Requester Field During Checkout

Checkout: Requisition Information

* Indicates required field

* Requisition Description	Paper - requires 2-way
Delivery	
<input type="checkbox"/> Urgent	
* Need-By Date	04-Sep-2004 00:00:00 
	(example: 23-Aug-2004 19:45:00)
* Requester	Vusirikala, Mr. Raju 
* Deliver-To Location	V1- New York City 

The figure above shows the Requester field on the requisition during checkout. When global requester functionality is enabled, then clicking the search icon next to this field enables you to select requesters in other business groups.

Note: When you click the flashlight icon, the list of available requesters includes all employees in the business group associated with the logon responsibility, plus the preparer. For example, a manager in the UK logs on using the US responsibility. This manager sees everyone in the US business group, plus herself.

Searching for Requisitions

Requisitions Search

Enter search criteria and press the Go button to find the requisitions.

Views

Requisition Created By	<input type="text" value="Vusirikala, Mr. Raju"/>		Requester	<input type="text"/>	
	<input checked="" type="checkbox"/> Include employees from all organizations			<input checked="" type="checkbox"/> Include employees from all o	
Requisition Created	<input type="text" value="Last 7 Days"/>		Requisition Status	<input type="text" value="All Statuses"/>	

The figure above shows two search fields when searching for requisitions in the Requisitions tab: Requisition Created By (preparer) and Requester. If the global requester functionality is enabled, then you can check the option *Include employees from other organizations* to expand the search to preparers or requesters in other business groups. The list of available preparers and requesters includes all employees in the business group associated with the logon responsibility, plus the preparer.

Note: As always, you can monitor only those requisitions that were created in the operating unit associated with your login responsibility. For example, a manager in the UK logged on using the US responsibility and created a requisition. When she logs on using the UK responsibility, she does not find the requisition. She finds it only when logging on using the US responsibility.

Setup Steps

1. Set HR: Cross Business Group to Yes to allow the selection of requesters in other business groups.

If this profile option is set to No, then preparers can select requesters in other operating units, but not in other business groups.

2. Set the profile option ICX: Override Requestor to either By All or Within Organization.

When ICX: Override Requestor is set to No, then the Requester field on the requisition defaults to the preparer and cannot be changed.

Profile Options

Set the following profile options as described in Setup Steps, above:

- HR: Cross Business Group
- ICX: Override Requestor

The following table illustrates how Oracle iProcurement behaves depending on the setting of these profile options:

HR: Cross Business Group and ICX: Override Requestor

HR: Cross Business Group	ICX: Override Requestor	Preparer's Actions
Yes	By All	Preparer can select any employee in or outside his business group.
Yes	Within Organization	Preparer can select any employee in or outside his business group.

Function Security

The functions for viewing or performing actions on My Group's Requisitions, My Requisitions, All Requisitions, Requisitions I Approved, and Orders to Approve behave the same regardless of how HR: Cross Business Group is set. For example, if the requester is given access to View My Group's Requisitions (and the security level access for the requisition document type in Oracle Purchasing is set to Public), then the requester can view all requisitions created in the operating unit that the requester is logged in to, regardless of whether the preparer belongs to the same business group.

Implementation Considerations

The accounting for the global requester functionality behaves no differently than it normally does:

- If the item is an expense item and no account information is defined for the item, then the system checks whether an account is associated with the *requester* (in the People window in Oracle Applications). As always, this account has to share the same set of books as the operating unit in which the requisition is created.
- If the account is not valid for the set of books of the operating unit in which the requisition is being created, then the system checks the favorite accounts that the *preparer* has defined in the iProcurement Preferences. If a valid account does not exist in the preferences, then the system still tries to build the account using the expense charge account rules, if set up.
- If the system cannot build the account information, then the preparer will be prompted to enter the appropriate accounting information manually during checkout.

Express Setup Tool

The Express Setup Tool allows for the fast definition and creation of locations, employees, and requester information. It is also possible to update some existing location and employee related fields using this tool.

The Express Setup tool is targeted towards rapid implementation for small to midsize companies who do not want (or do not yet want) to perform the complete employee and location setup in the Oracle Applications setup windows. It supports uploading of up to 500 records at one time.

Setup Steps

Express setup is performed in two steps:

1. Creating the files that contain your locations and employees.
2. Uploading the locations and employees files.

Preparing the Files:

1. Access the following files:

- `<APPL_TOP>/ICX/11.5.10/html/jsp/por/services/employees.zip`
- `<APPL_TOP>/ICX/11.5.10/html/jsp/por/services/locations.zip`

These files contain tab-delimited text (spreadsheet) templates in which to enter the data. Fields in the files are separated by tabs, without special formatting characters.

2. Save the Zip files to a working directory of your choice.
3. Extract the contents of the Zip files to your directory. (When you open the Zip file, a Comments dialog box appears. Click Close.)

Each Zip contains a blank template (.txt) file and a Readme file of instructions.

4. Fill in the locations and employees files.

Open the Readme files and follow the instructions for opening and populating each template (.txt) file.

5. Once you have created the files, place them in a directory, on the same machine that is used to run concurrent programs in Oracle Applications.

Talk to your database administrator or system administrator to determine which machine this is. Use FTP or telnet to transfer the files. Be sure to place the files in a read-access directory.

Loading the Files:

1. Log in to Oracle Applications and choose the Procure-to-Pay Administrator responsibility.
2. Navigate to the Find Requests window as follows: Reports > Run Report.
3. In the Find Requests window, choose Submit a New Request.
4. In the Submit Request window, select Express Setup Tool in the Name field.
5. In the Parameters window, enter the following:
 - Full path of the file name where you have placed your file.
 - File type (location or employee).

Note: The file must be in a read-access directory that resides on the same machine that runs the concurrent manager in Oracle Applications.

If you created new locations for employees in the employees file, load the locations file first. (Locations must already exist in Oracle Applications before they can be associated with an employee in the employees file.)

6. Choose OK, and then Submit.
7. Following a data load, a log is recorded that lists both the number of records loaded and not loaded successfully. A detailed description is given as to why a certain record did not load successfully.

To access the log, use the Find Requests window to find your request. Select your request and choose View Log.

For more instructions on submitting and monitoring requests, see the *Oracle Applications System Administrator's Guide*.

Profile Options

None

Function Security

Through function security, requesters can be prohibited from loading locations, employees, and requesters through the Express Loader Tool by excluding the function Express Setup Tools. See Set Up Function, Menu, and Data Security, page 2- 8 for detailed instructions.

Workflow

None

Implementation Considerations

- The Employee Number can only be loaded when it has been set to Manual. When set to Automatic, the system will reject the records containing employee numbers.
- The Employee Number should be unique for every requester.
- The name of the employee will be stored exactly as it is entered. Case conversion will not be performed. For example, an employee entered as tOM SmiTH in the file will appear exactly in this manner.
- Once a start date has been entered, it cannot be updated.
- Specifying the End-Date for an employee is not supported. (You would have to log into Oracle Applications and specify an End Date in the People window.)
- The location specified for the employee in the employees file must have already been created in Oracle Applications.
- Data load sequence:
 - Building on the previous note, the location loader should always be run before the employee loader.
 - The supervisor of an employee should already be defined in the system before entering the employee.
- The application user password cannot be updated using the loader.
- The loader only supports the American English language.
- Note the following considerations when express loading locations:
 - The loader only supports the address style of **United States**.

- Locations cannot be defined as **Global** using the loader.
- The loader only supports the American English language.

Charge Account Displays

Use the profile options listed below to determine how or whether to display charge account information at certain points during the checkout process.

The profile option POR: Generate and Display Account at Checkout affects the first step of the checkout.

First Step of Checkout: Charge Account Not Displayed

Checkout: Requisition Information

* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 3 Next

* Requisition Description Console Interface

Delivery

Urgent

* Need-By Date 30-Sep-2004 00:00:00
(example: 28-Sep-2004 19:45:00)

* Requester Vusirikala, Mr. Raju

* Deliver-To Location V1- New York City
Enter one-time address

Suggested Buyer

UN Number

Hazard Class

Billing

Project

Task

Expenditure Type

Expenditure Organization

Expenditure Item Date
(example: 28-Sep-2004)

* Taxable No

The figure above shows that when POR: Generate and Display Account at Checkout is set to No (its default value), then no charge account displays during the first step of the checkout. (It always displays when you edit lines and on the last, review-and-submit page of the checkout.)

First Step of Checkout: Charge Account Displayed

Checkout: Requisition Information

* Indicates required field

Cancel Save Submit Edit Lines Step 1 of 3 Next

* Requisition Description Console Interface

Delivery

Urgent

* Need-By Date 30-Sep-2004 00:00:00
(example: 28-Sep-2004 19:45:00)

* Requester Vusirikala, Mr. Raju

* Deliver-To Location V1- New York City
Enter one-time address

Suggested Buyer

UN Number

Hazard Class

Billing

Project

Task

Expenditure Type

Expenditure Organization

Expenditure Item Date
(example: 28-Sep-2004)

* Taxable No

Charge Account 01-510-7530-0000-000

The figure above shows that when POR: Generate and Display Account at Checkout is set to Yes, then the charge account displays during the first step of the checkout, in

the Billing section. (If the charge account varies by line, then the Charge Account field displays a "Multiple" link.)

The profile option POR: Display Legacy Accounting Flex UI affects the optional edit lines step of the checkout.

Edit Charge Account: Segments Not Separated

Selected Line

Line Description	Unit	Quantity	Price	Amount (USD)
1 Console Interface	Each	1	150.00 USD	150.00

Projects Charge Accounts

Line	Operations Accounting Flex	Percent	Quantity	Amount (USD)	Delete
1	01-510-7530-0000-000 <small>Company-Department-Account-Sub-Account-Product</small>	100	1	150.00	
Add Another Row		Total	100	1	150.00

The figure above shows how the charge account, 01-510-7530-0000-000, displays in a single field if POR: Display Legacy Accounting Flex UI is set to No (its default value). If desired, the requester can edit this field. (To edit the charge account, click Edit Lines during checkout. Click Accounts. Click the account itself.)

Edit Charge Account: Segments Separated

Selected Line

Line Description	Unit	Quantity	Price	Amount (USD)
1 Console Interface	Each	1	150.00 USD	150.00

Projects Charge Accounts

Line	Company	Department	Account	Sub-Account	Percent	Quantity	Amount (USD)	Delete
1	01 <small>Operations</small>	510 <small>Mision Operations Inventory</small>	7530 <small>Equipment Expense</small>	0000 <small>No Sub Account</small>	100	1	150.00	
Add Another Row					Total	100	1	150.00

The figure above shows how the charge account, 01-510-7530-0000-000, displays each segment in a separate field if POR: Display Legacy Accounting Flex UI is set to Yes. In this example, the segments are displayed in separate columns as follows: Company (01), Department (510), Account (7530), and Sub-Account (0000).

Whether the account displays in a single or separate field, the names of each segment still display, and the requester can click a search icon to search for the valid accounts for each segment. Only the method of displaying and searching the segments changes.

Searching for All Segments

Search

* Company

Operations

* Department

Vision Operations Inventory

* Account

Equipment Expense

* Sub-Account

No Sub Account

* Product

No Product

Results

Select	CodeCombination
<input type="radio"/>	01-510-7530-0000-000

The figure above shows how you can still search individual segments, even if you display all of them in one field.

Setup Steps

Set the profile options listed below.

Profile Options

Set the following profile options as desired:

- POR: Generate and Display Account at Checkout
- POR: Display Legacy Accounting Flex UI

See Profile Options, page 2-38.

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Expense Charge Account Rules

When determining the default charge account, the account generator may reference the charge account defined on the employee record. Expense Charge Account Rules enable you to override one or multiple segments of that default account based on the item category. This ability to override does not interfere with the action of the account

generator, but simply replaces those segments you configure after the account generator has created a charge account.

Setup Steps

1. Log in to Oracle Applications and choose the Procure to Pay Administrator responsibility.
2. Navigate to Purchasing Setup > Financials > Accounting > Expense Account Rules.
3. Define the rules (per item category) in the window displayed. Duplicate rules for the same category or account segment are not permitted.
4. Save your work.

Profile Options

Set POR: Apply Expense Account Rules to Favorite Charge Accounts to Yes. See Profile Options, page 2-38.

Function Security

None

Implementation Considerations

No additional considerations.

Employee P-Cards

Employee P-Cards are a way for companies to incorporate electronic payment and settlement procedures to streamline their procure-to-pay processes. Each requester is assigned his or her own employee P-Card to make purchases using Oracle iProcurement.

Setup Steps

For detailed information on setting up procurement cards, see the sections on Setting Up Credit Card Programs and Procurement Card Management in the *Oracle Payables User's Guide*.

In addition to the setup steps provided in the *Oracle Payables User's Guide*, you will need to enable supplier sites to accept procurement cards.

1. Log in to Oracle Applications. From the Oracle Purchasing menu, select Supply Base > Suppliers.
2. Query the supplier associated with the supplier site you want to set up.
3. Choose Sites. Query the supplier site for which you want to enable procurement cards.
4. Enable the Procurement Card check box to indicate that the supplier site is P-Card enabled.
5. Save the changes.

Profile Options

The profile option POR: Override Supplier P-card must be evaluated when implementing this feature. See Profile Options, page 2-38 for complete profile setup instructions.

Function Security

None

Workflow

None

Implementation Considerations

See considerations for Supplier P-Cards.

Supplier P-Cards

Supplier P-Cards (or Ghost Cards) are another way for companies to incorporate electronic payment and settlement procedures in order to streamline their procure-to-pay processes. Instead of having to maintain a separate employee P-Card for each requester in the company and each requester having to use his or her own employee P-Card to make purchases, companies can maintain a single supplier P-Card for each supplier/supplier site in the system, and consolidate all purchases from that supplier/supplier site on the single P-Card. The feature allows all requisitions in Oracle iProcurement (across requesters) created against the respective supplier/supplier site to be automatically charged to the single supplier P-Card. To enable the feature, the supplier P-Card must be set up and tied to the supplier/supplier site in advance. This arrangement improves control on the purchasing process and cuts down on maverick spending.

Setup Steps

There are two major business flows involved in the supplier P-Card functionality used in Oracle iProcurement:

- Supplier P-Card Setup
- Supplier P-Card Assignment For Requisitions

See the Implementation Considerations section below for a detailed discussion of these setup steps since they do not interact with Oracle iProcurement directly. Each of the major flows is set up separately.

Profile Options

POR: Override Supplier P-Card must be set. See Set Profile Options, page 2-38 for complete profile setup instructions.

Function Security

None

Workflow

None

Implementation Considerations

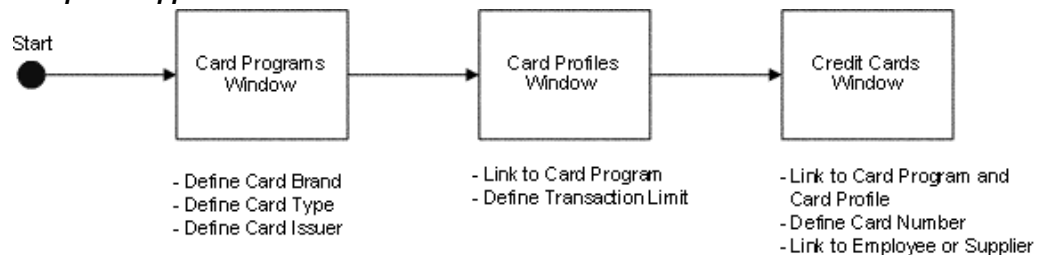
Supplier P-Card Setup

To enable the supplier P-Cards feature, you first need to enable supplier/supplier sites to accept procurement cards.

1. Log in to Oracle Applications. From the Oracle Purchasing menu, select Supply Base > Suppliers.
2. Query the supplier associated with the supplier site
3. Choose Sites. Query the supplier site for which you want to enable procurement cards.
4. Enable the Procurement Card check box to indicate that the supplier site is P-Card enabled.
5. Save the changes.

After the supplier/supplier sites have been enabled for P-Cards, you need to set up supplier P-Cards in Oracle Payables using a process similar to the setup for employee P-Cards. To set up supplier P-Cards, the windows detailed in the figure below must be populated.

Setup for Supplier P-Card



Card Programs: This window is used to set up the following information for a P-Card:

- Card Brand: Card brand name (American Express, Diners, Visa, Mastercard, and so forth).
- Card type: Select whether the card is of type Procurement, Travel, or Supplier. Only P-Cards of type Supplier and Employee can be used in Oracle iProcurement. To set up a supplier P-Card, you would have to select a card type of Supplier.
- Card Issuer/Issuer Site: Select a card issuer/issuer site for the card program. The card issuer/issuer site needs to be an active supplier/supplier site in the system.

Card Profiles: This window is used to associate card profile(s) to the card program. Multiple credit card profiles can be associated with each card program. The profile records any transaction amount limits that are associated with a P-Card. These transaction limits will be passed on to the P-Cards (both employee and supplier) that are created using the profile.

Note: When the P-Card (employee or supplier) associated with the card profile is used for a requisition checkout in Oracle iProcurement, the transaction limit is enforced as follows:

- If the aggregate amount (in functional currency for the operating unit) for all line(s) in the requisition checkout that can be charged to the P-Card is equal to or smaller than the transaction limit defined on the card profile, then the P-Card will be assigned to all the line(s).
- If the aggregate amount (in functional currency for the operating unit) for all lenses) in the requisition checkout that can be charged to the P-Card is greater than the transaction limit defined on the card profile, then the P-Card will not be assigned to any of the line(s).

Credit Cards: This window (shown in the figure below) is used to define the P-Card and associate it with a card program and card profile.

Credit Cards Window

The screenshot shows the 'Credit Cards' window with the following fields and sections:

- Card Program:** Visa
- Card Member Name:** (empty)
- Employee Name:** (empty)
- Department Name:** (empty)
- Card Description:** Visa
- Expiration Date:** (empty)
- Profile:** Supplier
- Card Number:** 5287-8598-9854-2121
- Employee Number:** (empty)
- Date of Birth:** (empty)
- Inactive On:** (empty)

Maximum Amounts

- Per Transaction: (empty)
- Per Period: (empty)
- Physical Card Issued
- Paper Statement Wanted

Supplier Information

- Supplier: Zaks Gift Supplies
- Select All Eligible Sites (button)

Supplier Site Information

Site	Site Address
ZAKS MAIN	98710 Huntington Drive,,,,,Glendale,CA,9120

This window can be used to enter the following information:

1. Enter information for the P-Card such as the card number and expiration date.
2. Associate the card with the card program and card profile.
3. If the card program selected is of type Procurement, then additional information about the employee who would own the P-Card can be entered in the window.
4. If the card program selected is of type Supplier, then the supplier/supplier site(s), which are to be associated with the supplier P-Card, can be entered. The business rules for associating the P-Card to a supplier/supplier site when the card program selected is of type Supplier are as follows:

- The fields in the window that are applicable for a card program of type Procurement (such as Card Member Name, Employee Name, and Employee Number) cannot be entered.
- The supplier and supplier site fields on the window are mandatory. That is, each supplier P-Card must have at least one supplier/supplier site associated with it.
- Each supplier site can only be associated with a single supplier P-Card.
- A single supplier P-Card can be associated with (shared by) multiple supplier sites as long as the supplier sites belong to the same supplier.
- Supplier sites within a supplier can each be associated with different supplier P-Cards.
- The Select All Eligible Sites button provides the requester the ability to enter the multiple supplier sites quickly and easily. Hitting the button will automatically fill up the supplier site fields for the selected supplier with valid but unassigned (that is, the site is not assigned to another supplier P-Card) supplier site(s) for the selected supplier.

For additional information about setting up supplier P-Cards, see the *Oracle Payables User's Guide*.

Supplier P-Card Assignment for Requisitions

When the requester creates a requisition in Oracle iProcurement, one of the following payment methods can be assigned to each line on the requisition:

- Employee P-Card
- Supplier P-Card
- No P-Card (payment method on invoice)

As the requester is checking out a requisition in Oracle iProcurement, the application checks and determines which payment method should be assigned to each line on the requisition. The first payment method (employee P-Card) is an option which the requester can explicitly select during the requisition checkout. The other two payment methods (supplier P-Card and no P-Card) are automatically assigned to the requisition line by the application when certain conditions are met (the requester does not have to explicitly select them).

Note: A requisition in Oracle iProcurement can contain multiple line(s). Depending on the source of the item/service on the line (internal or from external supplier/supplier site), the type of the item (expense or inventory) and other setup, different payment methods could be applicable for each line. Hence, the assignment of the payment method is done at the requisition line level, and not at the requisition header level.

The following business rules apply for the assignment of payment methods to a requisition line during checkout:

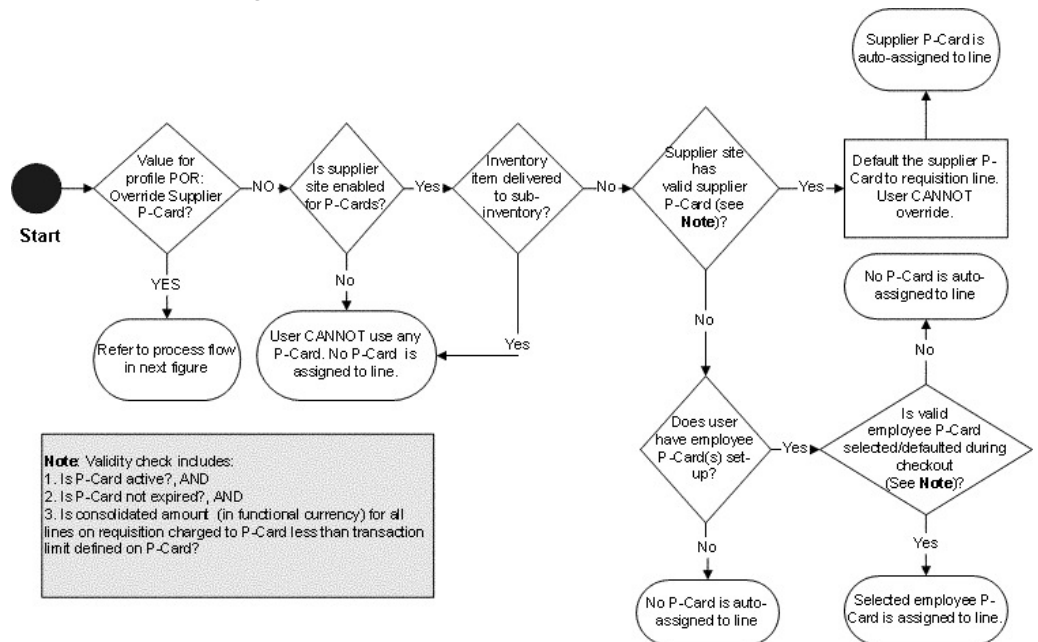
1. No P-Card (neither employee P-Card nor supplier P-Card) can be assigned to a requisition line in the following cases:
 - No supplier/supplier site is available or selected for the requisition line.
 - The item or service on the requisition line is sourced internally.

- The supplier/supplier site available or selected for the requisition line is not P-Card enabled.
 - No employee P-Card has been set up for the requester and no supplier P-Card has been set up for the supplier/supplier site that is available or selected for the requisition line.
 - The requisition line is associated with a project, in which case a P-Card (employee or supplier) cannot be assigned to the line.
 - For an inventory item being delivered to a subinventory, a P-Card (employee or supplier) cannot be assigned to the line. On the other hand, if the inventory item is not delivered to a subinventory, then a P-Card (employee or supplier) can be assigned to the line.
2. If none of the above cases is met, then P-Cards (employee or supplier), if set up, are eligible to be assigned to the requisition line. Only one of them can be applied, and Oracle iProcurement determines which one to apply during the requisition checkout process.

In order to provide maximum flexibility, a system profile controls which P-Card (employee or supplier) gets precedence when both P-Card types are eligible to be applied to the requisition line. The profile is called POR: Override Supplier P-Card. This profile applies to the Supplier P-Card Assignment for Requisitions business flow.

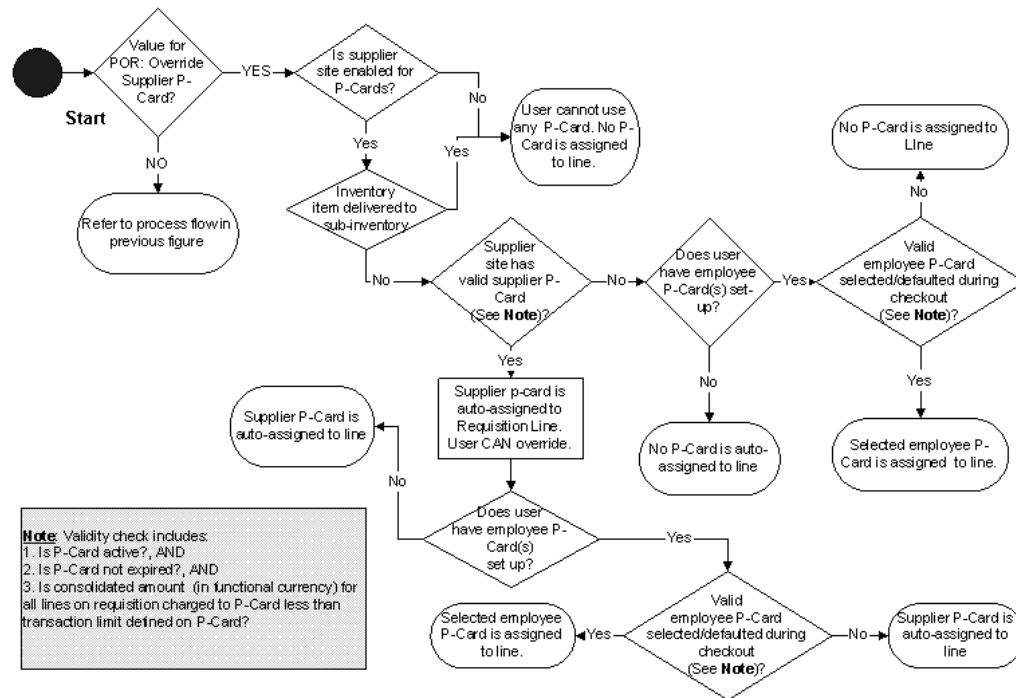
3. If none of the cases mentioned in Rule #1 is applicable and if the POR: Override Supplier P-Card profile value is set to No, the business logic for assignment of P-Cards to a requisition line during a checkout is illustrated in the following figure.

Supplier P-Card Assignment for Profile Set to No



4. If none of the cases mentioned in Rule #1 is applicable and if the POR: Override Supplier P-Card profile value is set to Yes, the business logic for assignment of P-Cards to a requisition line during a checkout is illustrated in the following figure.

Supplier P-Card Assignment for Profile Set to Yes



5. After the application has determined the payment method for the requisition line(s) during checkout, the information is made visible to the requester. Access to this information is available on the **Review and Submit** page during checkout, and also on the **Requisition Details** page after the requisition has been submitted. If an employee P-Card has been assigned to at least one line on the requisition, then the partially masked employee P-Card number is displayed in the P-Card Number field at the requisition header level. At the requisition line level, the P-Card Used field will indicate which payment method is assigned to that particular line. The possible values for this field are:

- Yes when employee P-Card is assigned to the line
- Supplier P-Card when supplier P-Card is assigned to the line
- No when no P-Card is assigned to the line
 - Only one employee P-Card can be used per requisition and it may or may not apply to all the lines on the requisition. So the P-Card Number field at the requisition header level contains either a single partially masked employee P-Card number or a blank value.
 - The actual supplier P-Card number is not displayed to the requester (neither in the P-Card Number field at the requisition header level nor in the P-Card Used field at the requisition line level). The value of the P-Card Used field at the requisition line level (when it is Supplier P-Card) is the only indication to the requester that a supplier P-Card has been assigned to the line.

Supplier P-Card Carryover from Requisition to Purchase Orders

The requisition that is created in Oracle iProcurement is converted into a purchasing document in Oracle Purchasing. When all the necessary conditions are met, the resulting purchase order document contains the supplier P-Card number that was associated with the requisition line. Currently there are three processes in Oracle Purchasing to convert a requisition into a purchase order:

- PO Create Documents workflow: Workflow process to automatically create standard purchase orders and blanket releases from approved requisitions.
- Autocreate window: Utility to manually create standard purchase orders and blanket releases from approved requisitions.
- Create Releases: Concurrent program to generate releases for existing blanket purchase agreements from approved requisitions.

Common Business Rules for All Requisition-to-Purchase Order Conversion Processes

- As discussed in the Supplier P-Card Assignment for Requisitions section above, the P-Card Used flag for the requisition lines coming from Oracle iProcurement holds three possible values: Yes, No, or Supplier P-Card. This flag determines whether and which P-Card number (employee or supplier or none) should be applied to the purchase order, which is generated in Oracle Purchasing.
- A P-Card (employee or supplier) can be assigned to purchase order documents of type Standard Purchase Order and Blanket Purchase Release only. Only one P-Card number (employee or supplier) can be assigned per purchase order and is applied at the header level of the purchase order only, and, unlike a requisition in Oracle iProcurement, applies to all the lines on the purchase order.

Note: If purchase orders are created directly or are created from requisitions submitted in Oracle Purchasing (that is, there is no associated requisition in Oracle iProcurement), then no P-Card can be assigned to the purchase order, even if the particular supplier/supplier site accepts P-Cards.

The logic to determine how and which P-Card number (employee or supplier or none) should be applied to the purchase order works as indicated in the table below. This logic applies to all the three requisition-to- purchase order conversion processes.

Common P-Card Logic

Number	Value of P-Card Number for Requisition Header	Value of P-Card Used Flag for Requisition Line(s)	Requisition-to-Purchase Order Conversion Logic in Oracle Purchasing
1	None	Yes	Scenario NOT possible. If there is no P-Card number at requisition header level, all values for P-Card Used flag should either be No or Supplier.
2	None	No	No employee P-Card can be applied to purchase order. For such requisition line(s): If requisition line(s) have same supplier/ supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order. Else, requisition line(s) will be put on different purchase order(s).

Number	Value of P-Card Number for Requisition Header	Value of P-Card Used Flag for Requisition Line(s)	Requisition-to-Purchase Order Conversion Logic in Oracle Purchasing
3	None	Supplier	<p>No employee P-Card can be applied to purchase order.</p> <p>Derive supplier P-Card defined for supplier/supplier site:</p> <p>If supplier P-Card is valid (refer to Note), maintain supplier P-Card for requisition line(s).</p> <p>If supplier P-Card is invalid, delete supplier P-Card for requisition line(s).</p> <p>For such requisition line(s):</p> <p>If requisition line(s) have same supplier/supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</p> <p>Else, requisition line(s) will be put on different purchase order(s).</p>

Number	Value of P-Card Number for Requisition Header	Value of P-Card Used Flag for Requisition Line(s)	Requisition-to-Purchase Order Conversion Logic in Oracle Purchasing
4	Employee P-Card Number	Yes	<p>Employee P-Card from requisition header can be applied to purchase order:</p> <p>If employee P-Card is valid (refer to Note), maintain employee P-Card for requisition line(s).</p> <p>If employee P-Card is invalid, delete employee P-Card for requisition line(s).</p> <p>For such requisition line(s):</p> <p>If requisition line(s) have same supplier/ supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</p> <p>Else, requisition line(s) will be put on different purchase order(s).</p>
5	Employee P-Card Number	No	<p>Do not apply employee P-Card from header level to line(s).</p> <p>For such requisition line(s):</p> <p>If requisition line(s) have same supplier/ supplier site and other purchase order header level information, then requisition line(s) can be put on a single purchase order.</p> <p>Else, requisition line(s) will be put on different purchase order(s).</p>

Note: Validity check for employee and supplier P-Cards includes:

- Is card active?, AND
- Is card not expired?, AND

- Is Supplier/Supplier Site P-Card enabled?

Additional Business Rules for Purchase Order Autocreate Window

In addition to the logic discussed in the previous table, when a buyer in Oracle Purchasing converts a requisition into a purchase order using the Purchase Order Autocreate window, the buyer can resolve or change the supplier/supplier site at that time. However, even if the buyer selects a supplier/supplier site which accepts supplier P-Cards, the P-Card information will be not applied at that time. In other words, only the requisition lines which have P-Card information assigned to them during the requisition checkout in Oracle iProcurement can have P-Cards assigned to them in the resulting purchase order.

Business Rules for Changing Supplier/Supplier Site on Purchase Order

Even if there is a P-Card assigned to the purchase order, the buyer has the ability to change the supplier/supplier site on the purchase order. The new supplier/supplier site may not accept P-Cards (employee or supplier) and it could lead to an error condition. Hence, if a P-Card (employee or supplier) exists on a purchase order, and, if the buyer changes the supplier/supplier site on the purchase order, the application automatically deletes the P-Card number on the purchase order. Before doing so, the application generates an appropriate warning message for the buyer.

Purchase Order Communication to Supplier

Once the purchase order with the assigned supplier P-Card has been created and approved, the supplier P-Card information is sent as a part of the purchase order when it is communicated to the supplier. The information sent is adequate for the supplier to charge the amount on the purchase order to the assigned supplier P-Card. Similar to the existing support for the employee P-Card, the following information for the supplier P-Card is sent as a part of the purchase order:

- P-Card Number
- Card Member Name
- Expiration Date for P-Card
- Credit Card Brand

Also, similar to existing support for employee P-Cards, the supplier P-Card information will be sent as a part of the purchase order only when the purchase order is communicated to the supplier via EDI delivery and XML delivery.

For detailed information on purchase order communication to the supplier using EDI delivery, see the *Oracle e-Commerce Gateway User's Guide*. For detailed information on purchase order communication to the supplier via XML delivery, see the *Oracle Purchasing 11i XML Transaction Delivery Guide* and the *Oracle XML Gateway User's Guide*.

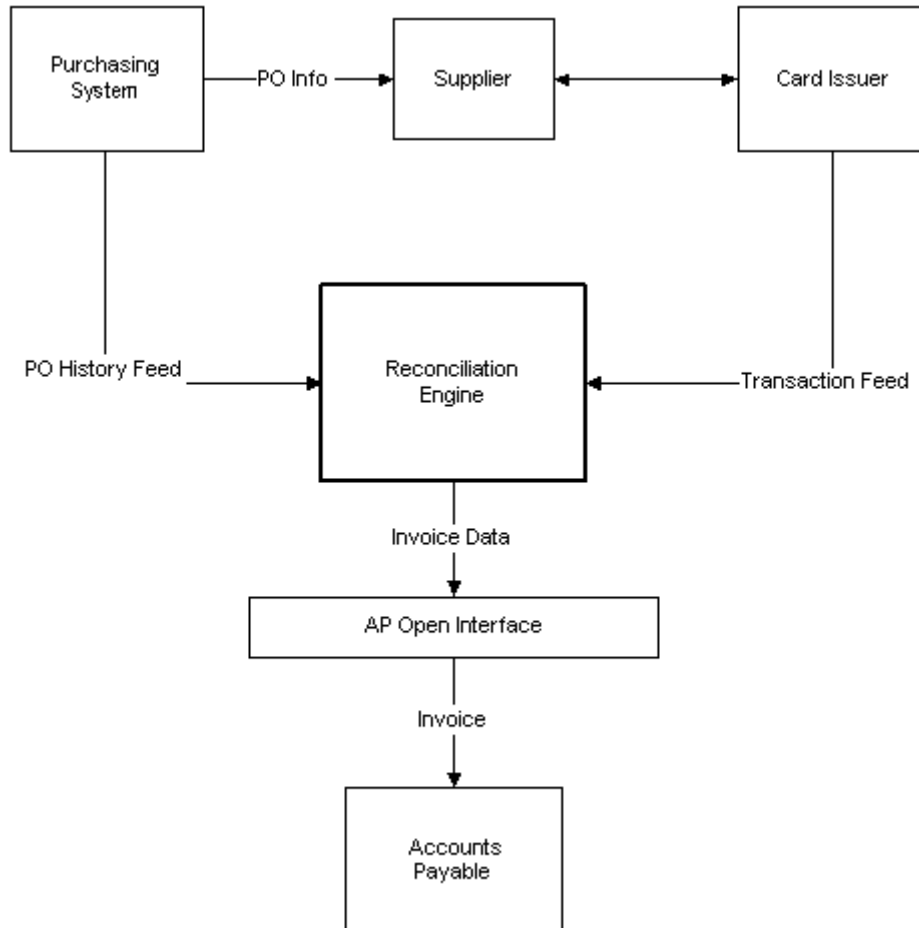
Purchase Order (PO) Extract for P-Card Reconciliation

The P-Card reconciliation process provides the capability to electronically reconcile the P-Card statements and the corresponding purchase orders in the buyer's purchasing application for both employee and supplier P-Card transactions. The reconciliation engine is typically provided by the card issuer and resides in the buyer's purchasing system. In order to accommodate the reconciliation process, the engine needs a couple of information feeds:

- Transaction feed from the P-Card issuer containing charges for the billing cycle
- Purchase order history feed from the buyer's purchasing system for the billing cycle

This reconciliation is necessary so that the buyer is able to electronically verify that only valid supplier purchase orders are included in the invoice(s) that are paid to the card issuer. After a successful reconciliation between the PO history feed and the transaction feed, the reconciliation engine typically sends the reconciled data files to Oracle Payables (using the Oracle Payables Open Interface). The figure below shows the flow for the P-Card reconciliation process:

P-Card Reconciliation Flow



Please refer to the documentation provided with the reconciliation engine and the *Oracle Payables User's Guide* for detailed information on this part of the process.

At the end of the P-Card billing cycle, typically the buying company receives a transaction feed containing an electronic statement for all P-Card purchases made by the buying company. The corresponding purchase order information for the P-Card billing cycle needs to be extracted from the buyer's purchasing application. The Purchase Order Extract for P-Card Reconciliation feature provides the capability to prepare the purchase order history feed for the reconciliation engine. It is a concurrent report/request, called PO History Feed, which can be run in Oracle Purchasing to generate the feed.

Concurrent Report

The new concurrent report accumulates and compiles the necessary PO history data in a specific format. Upon its completion, the output file is stored in a specified directory location. The following business rules apply to the concurrent request:

1. Name for the concurrent program:
 - Title: Purchase Order History Feed for P-Card Reconciliation
 - Description: Purchase Order History Feed for reconciling P-Card payments
2. The concurrent program belongs to Oracle Purchasing.
3. The program can be initiated at any time but is typically run before the end of the monthly billing cycle for the P-Card. It can also be set to run at a pre-specified frequency through standard report submission (SRS).
4. The output of the concurrent program will be stored in a specific directory. The directory is derived from the UTL_FILE_DIR parameter in the INIT.ORA file of the Oracle Purchasing installation. The application administrator should set up the output directory location prior to running the concurrent program.
5. The PO History Feed Report Request window has the following parameters which need to be entered prior to the submission of the report:
 - Card Brand Name: List of values containing all available card brand names.
 - Card Issuer/Card Issuer Site: List of values containing all valid Card Issuer/Issuer Sites.
 - From Date/From Time: From Date and Time. The last_update_date for a purchase order should be on or later than the selected date and time in order for it to be selected.

After the requester has entered a valid Card Brand Name, Card Issuer and Card Issuer Site, the From Date/From Time field on the window gets auto-filled with the To Date and To Time information from the last successfully run report (report with *Completed Phase with Normal Status* or *Complete Phase with Warning Status*) for the selected card brand name and card issuer/card issuer site combination. Using this logic reduces the chances of sending duplicate PO History Feeds by running reports with overlapping dates and missing PO records by skipping intermediate dates.

Note: If the last run report for a particular card brand name and card issuer/card issuer site combination is not completed successfully (the request is in any phase/status other than *Completed Phase with Normal Status* or *Complete Phase with Warning Status*), then the To Date/Time information for that request is not tracked.

- To Date/To Time: To Date and Time. The last_update_date for a purchase order should be earlier than the selected date and time in order for it to be selected.
 - Output Filename: The name of the file in which the PO History feed file generated by the report should be stored in the output directory location. If a file with the same filename as the one selected in the Output Filename field already exists in the output directory, then the new file will overwrite the existing file in the output directory.

Criteria Selection of Purchasing Records

Only purchase orders which satisfy certain selection criteria are included in the PO history feed. Some of the selection criteria for the purchase records are entered on the PO History Feed Report Request window (as discussed in the section above), while the rest of the selection criteria are automatically and internally applied by the application. The internal selection criteria are as follows:

- Only purchase orders of type Standard Purchase Order and Blanket Release are available for selection.
- Only purchase orders created against supplier/supplier sites that belong to the same operating unit as the requester's responsibility are selected.
- The different values for the Approval Status, Control Status, and On Hold Status for the purchase order in Oracle Purchasing determine whether the purchase orders should be sent as a part of the PO History Feed. The following business rules apply:
 - Only purchase orders with an approval status of *Approved* and *Requires Reapproval* are eligible for selection; purchase orders with any other approval status do not get extracted.
 - Purchase orders with an approval status of *Requires Reapproval* get selected only if they have been approved at least once before they were put in the current approval status of *Requires Reapproval*.
 - Based on a combination of the Approval Status, Control Status, and On Hold Status for the purchase order, the program will generate three possible statuses for the Order Status field for the purchase order included in the PO History Feed:
 - ON: Purchase order is open and should be reconciled with the corresponding transaction feed from the card issuer.
 - HL: Purchase order is temporarily put on hold, but the hold may get released at a later time. However, it should not be reconciled with the corresponding transaction feed from the card issuer while it is still in the HL status.
 - CN: Purchase order is permanently canceled and should not be reconciled with the corresponding transaction feed from the card issuer.

The figure below indicates the selection logic based on the Approval, Control, and On Hold statuses of the purchase order in Oracle Purchasing and the appropriate output status for the purchase order in the PO History Feed.

Status and Selection Logic

Number	Approval Status	Control Status	On Hold Status	Selection and Status of Purchase Order in PO History Feed
1	Approved	All except Canceled and Finally Closed	Not On Hold	PO is sent with Order Status = ON
2.	Approved	All except Canceled and Finally Closed	On Hold	PO is sent with Order Status = HL
3	Approved	Canceled OR Finally Closed	Does Not Matter	PO is sent with Order Status = CN
4	In Process	Does Not Matter	Does Not Matter	PO is not sent
5	Incomplete	Does Not Matter	Does Not Matter	PO is not sent
6	Pre-approved	Does Not Matter	Does Not Matter	PO is not sent
7	Rejected	Does Not Matter	Does Not Matter	PO is not sent
8	Requires Reapproval ¹ .	All except Canceled and Finally Closed	Does Not Matter	If (PO AP PROVED_DATE ¹ NULL), PO is sent with Order Status = HL If (PO AP PROVED_DATE = NULL), PO is not sent
9	Requires Reapproval ³ .	Canceled or Finally Closed	Does Not Matter	If (PO AP PROVED_DATE ¹ NULL), PO is sent with Order Status = CN If (PO AP PROVED_DATE = NULL), PO is not sent

For complete details of the format and data elements of PO History Feed see the PO History Feed File appendix of this guide.

Setup Steps

As mentioned in the section above, the output of the concurrent program will be stored in a specific directory. The directory is derived from the UTL_FILE_DIR parameter in the INIT.ORA file of the Oracle Purchasing installation. For additional details

about setting the output directory location, refer to the *Oracle e-Commerce Gateway Implementation Manual*.

Profile Options

None

Function Security

None

Workflow

None

Implementation Considerations

None

Project Accounting

Integration with Oracle Projects enables requesters to optionally reference project and task information on requisition lines. The cost of a single requisition line can be distributed across one or more projects.

Setup Steps

For detailed information, see the *Oracle Projects Implementation Guide*.

Once Oracle Projects is implemented, decide whether to expose the project and task fields to requesters:

- By default, the following fields display if Oracle Projects is installed, and the destination type is Expense: Project, Task, Expenditure Type, Expenditure Organization, Expenditure Item Date.
- If the destination type is Inventory or Shop Floor, then the Project and Task fields require Project Manufacturing to be enabled.

If you want to hide any of the project-related fields, then use Oracle Applications Framework. See *Personalize Oracle iProcurement Using Oracle Applications Framework*, page 2-18.

Note: If Oracle Projects is installed, then the project related fields display in the Billing section of the requisition, even if you do not implement or use Oracle Projects. Therefore, you may want to hide these fields if you do not use them.

Profile Options

None

Function Security

None

Implementation Considerations

No additional considerations.

Grants Accounting

Oracle Grants Accounting is integrated with Oracle iProcurement to support the charging of requisitions and resulting purchase orders to projects funded by grants (Awards). The integration introduces the concept of an award number, which represents additional information about the source of funding associated with projects and tasks.

In addition to the standard project and task information, the Award dimension from Oracle Grants Accounting can be used to specify the source of funding associated with projects and tasks. This helps organizations manage all aspects of the grant funding they receive. In higher education institutions, other public sector agencies, and project-intensive commercial enterprises, it is often necessary to distribute the cost of a purchase request line across multiple projects. To support this need, you can enter multiple projects and awards for each requisition line.

The Award number field will be enabled if Oracle Grants Accounting has been implemented for the associated operating unit. The Award number field is only required for projects that are funded by awards in Oracle Grants Accounting.

To enable Oracle Grants Accounting integration with Oracle iProcurement, customers will need to apply Grants Accounting Patchset L (Patch 3018908).

Setup Steps

Oracle Projects and Oracle Grants Accounting must be installed. For detailed information, refer to the *Oracle Grants Accounting User's Guide*.

By default, the Award field displays if Oracle Grants Accounting is implemented for the associated operating unit. If you want to hide this field, then use Oracle Applications Framework. See *Personalize Oracle iProcurement Using Oracle Applications Framework*, page 2-18.

Profile Options

None

Function Security

None

Implementation Considerations

No additional considerations.

Estimated Tax Functionality

Estimated purchase tax can be calculated for each requisition line created in Oracle iProcurement. The estimated tax code and rate can be generated for every requisition line based on a predefined setup in Oracle Purchasing.

This setup is based on a hierarchy, and the tax can be derived from the item, location, supplier, supplier site, or financial options. This tax hierarchy is found in the Purchasing Options that are defined within Oracle Purchasing. The tax codes/names

used in Oracle iProcurement are also defined in Oracle Purchasing. Recovery rates are also supported, and the generated tax information can optionally be overridden by the requester. Recovery rates are associated with tax codes/names or through recovery rules. Once again, this setup is defined in Oracle Purchasing.

Tax summary information is available at the requisition header level. Tax detail information is available at the requisition line level.

Setup Steps

1. Define the tax hierarchy in the Purchasing Options window in Oracle Purchasing, using the following navigation: Purchasing > Setup > Organization > Purchasing Options.
2. Create Tax Codes/Names and associate appropriate tax rates. Refer to the *Oracle Payables User's Guide*.
3. Define Tax Recovery rates/rules (optional).
4. Associate the above tax codes/names to:
 - Supplier
 - Supplier Site
 - Ship-to Location
 - Item
 - Financial Options Default

Note: Tax codes cannot be associated with suppliers in a multi-organization implementation. In this case, tax codes can still be associated with supplier sites.

Profile Options

Two profile options affect the usage of the estimated tax functionality in Oracle iProcurement:

- Modifying the tax name that is defaulted during the checkout process is controlled through the profile Tax: Allow Override of Tax Code.
- Modifying the generated recovery rate is controlled through the profile Tax: Allow Override of Tax Recovery Rate.

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Favorite Charge Accounts

The favorite charge accounts functionality provides the requester the capability to maintain a list of up to 50 frequently used charge accounts on the **iProcurement Preferences** page. During the checkout process, the requester can access the favorite charge accounts list and use it to auto-fill the charge account information for the item(s), rather than having to manually enter the charge account information.

Setup Steps

To create favorite charge accounts, the requester should do the following:

1. Log in to Oracle iProcurement.
2. On the **Home** page, click "Preferences" in the upper-right corner.
3. In the preferences, click "iProcurement Preferences."
4. Enter Favorite Charge Accounts and a nickname for each account. To add another row, choose Add Another Row.
5. Select a default favorite charge account.
6. Save the changes.

Profile Options

None

Function Security

Function Security exists to disable the Favorite Charge Account List functionality. The function is called Favorite Charge Accounts. See Set Up Function, Menu, and Data Security, page 2- 8 for details on function security setup.

Implementation Considerations

- The favorite charge account list is the last resort to generate the charge account information for the item. If the Account Generator workflow engine, which includes Employee Default Charge Account and the Commodity-based Accounting Rules, has already been set up, then the favorite charge accounts functionality will not affect it.
- The requester can add, delete, or modify accounts in the list. A nickname for an account is mandatory, and it has to be unique per list. One of the accounts in the list has to be selected as the default.
- The requester can have one favorite charge account list per responsibility. If the requester has multiple responsibilities, they can choose a favorite charge account list per responsibility. The accounts maintained in one responsibility will not be available in the other responsibilities. If the requester has responsibilities that roll up to multiple sets of books with different accounting structures, then the favorite charge accounts list will conform to the respective accounting structures.
- The favorite charge account functionality will not affect the system profile for Dynamic Insertion of Charge Accounts. If the profile has been turned on, requesters still can create new charge accounts on the fly in the preferences as well as during the edit lines step of the checkout.

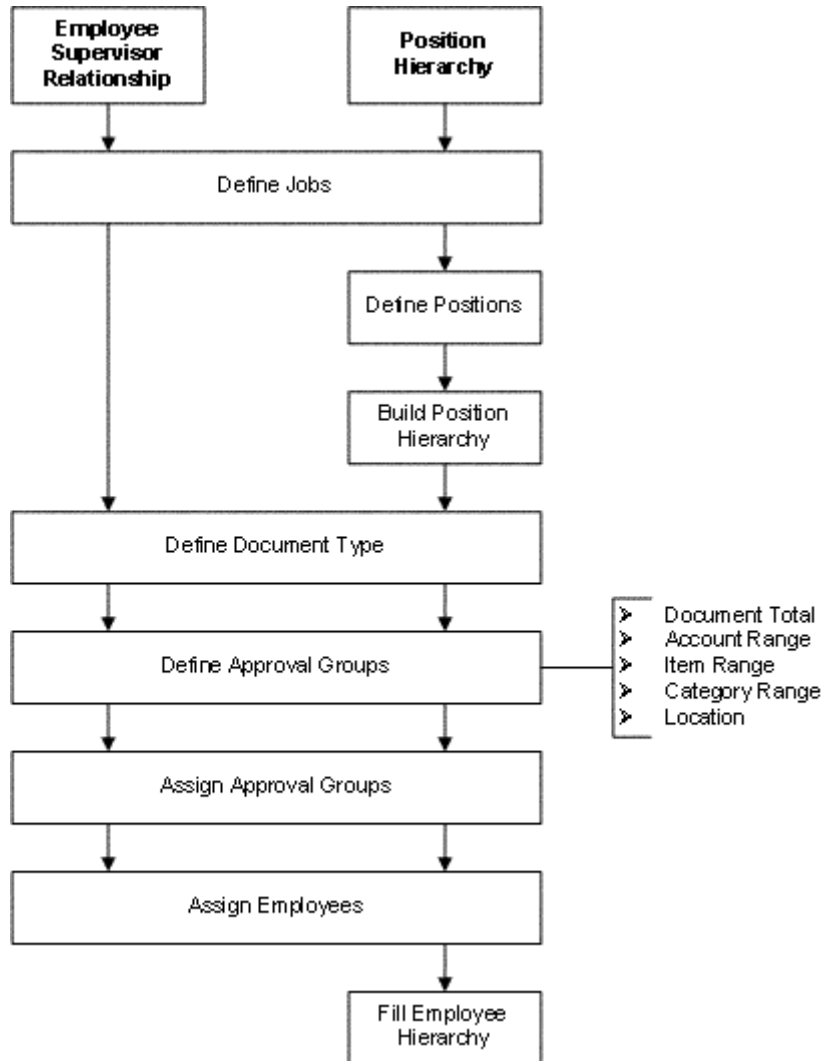
- A requester can store only valid charge accounts in the favorite charge account list. If a charge account is deactivated in Oracle General Ledger after the requester has already stored it in the favorite charge accounts list, then an error will be raised when the requester resubmits the **iProcurement Preferences** page (by clicking Apply Changes). The requester then has the opportunity to edit or delete the charge account in the favorite charge account list. Until the deactivated account is changed, it will also raise an error if it is used during checkout.

Approvals

There are two ways you can conduct requisition approvals in Oracle iProcurement:

- Use the approval setup from Oracle Purchasing. See the *Oracle Purchasing User's Guide*.
- Use Oracle Approvals Management, also known as the Approvals Management Engine (AME). AME enables you to define approval rules once and leverage them across multiple applications.

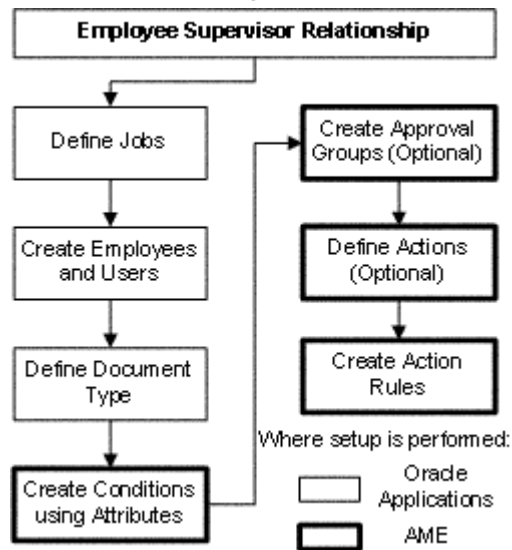
Approval Setup in Oracle Purchasing



The figure above shows that an employee/supervisor approval setup in Oracle Purchasing consists of the following steps:

- Define jobs
- Define document types
- Define approval groups
- Assign approval groups
- Assign employees

Approval Setup Using AME



The figure above shows how the approvals setup looks using AME. For a detailed description of each of these steps, see the AME setup steps below.

Note: Oracle iProcurement does not support the parallel approval feature of AME. You also cannot implement position hierarchy approvals in Oracle iProcurement using AME.

Whether you set up approvals in Oracle Purchasing or AME, the Requisition approval workflow in Oracle Purchasing handles the approval. For example, the Approval List Routing Using AME process in the Requisition approval workflow is initiated if AME approvals have been set up (as described below). This process uses your approval setup in AME to perform the approval, send notifications, and complete other approval tasks in Oracle iProcurement.

Setup Steps

Implement Oracle Purchasing Approvals:

For instructions, see the approval setup information in the *Oracle Purchasing User's Guide*. See also information about requisition approval workflow attributes, whose defaults you can change if desired, in the *Oracle Purchasing User's Guide*.

Implement AME:

1. Determine approval structure.

Offline, determine your approval structure. For example:

- Meredith Walton, Buyer, reports to
- Pat Stock, Manager, reports to
- Casey Brown, Executive

2. Define jobs:

- Create a job.
- Assign approval authority to the job.

In the Human Resources responsibility, use the following navigation to open the Job window: Work Structures > Job > Description.

Job Window

Job

Job Group:

Name:

Dates: -

Approval Authority:

Additional Employment Rights

Benchmark Job

Benchmark Job Name:

Further Information: []

3. Create employees and users:

- Create employees and assign appropriate jobs and supervisors.
- Create users.
- Add appropriate responsibilities to the users.

4. Navigate to the Document Types window in Oracle Purchasing as follows: Setup > Purchasing > Document Types.

5. Select a Document Type of Purchase Requisition, Internal Requisitions, or Change Order Request: Requisition.

6. For the selected document type, select one of the provided Approval Transaction Types, or one that you created in AME:

- PURCHASE_REQ
- INTERNAL_REQ
- RCO

Document Types Window

Type	Subtype	Name	Quotation Class
Requisition	Purchase	Purchase Requisition	

Attributes

Owner Can Approve
 Approver Can Modify
 Can Change Forward-To
 Can Change Forward-From
 Can Change Approval Hierarchy
 Disable
 Use Contract Agreements for Auto Sourcing
 Include Non-Catalog Requests

Security Level: Public
 Access Level: Full
 Forward Method: Direct
 Archive on:
 Default Hierarchy: Materials
 Approval Workflow: PO Requisition Approvz
 Workflow Startup Process: Main Requisition Appro
 Approval Transaction Type: PURCHASE_REQ
 Autocreate Workflow: PO Create Document...
 Autocreate Workflow Startup Process: Overall Document Crea

Note: Use the Approval Transaction Types field to enable or disable AME. If a transaction type is selected in this field, then Oracle iProcurement uses AME to conduct approvals. If you leave the Approval Transaction Types field blank, then AME approvals are not used; instead, the approval setup in Oracle Purchasing will be used.

7. Use the *Oracle Approvals Management Implementation Guide*, available on *OracleMetaLink* (search for "Oracle Approvals Management Implementation Guide", with quotation marks, or for Note 282529.1), to complete the following steps:
 - Create attributes. See the list of attributes that Oracle iProcurement provides, below. For example:
 - ITEM_CATEGORY (line level)
 - REQUISITION_TOTAL (header level)
 - Create conditions using the attributes. Conditions are the "if" clause in an action rule. They are similar to approval groups in Oracle Purchasing. For the rule to apply to a transaction, all of its conditions must be true.

For example, to enforce a rule about a requisition's total amount, you could have the following condition, where REQUISITION_AMOUNT is an attribute: USD1000 <= REQUISITION_AMOUNT < USD5000. In this example, a requisition initiates this approval rule when the requisition total amount is greater than or equal to 1000 USD and under 5000 USD.

- Create approval groups (optional). An approval group is an ordered set or list of one or more approvers. For example, an approval rule can add an approval group's members, in order, to a transaction's approval list. Typically, approval groups represent functional approvers outside a transaction's chain of authority, such as finance or internal legal counsel, that must approve a transaction before or after management has done so. You can also insert an approval group into the chain of authority.
- Define actions (optional). Actions are used to generate the approval list for a transaction. If a transaction satisfies all conditions in an action rule, then the associated actions are processed to generate the approval list.
- Create action rules.

Define rules based on the conditions, that result in an action. For example:

- If the condition USD1000 <= REQUISITION_AMOUNT < USD5000 is met, then require approvals up to at least level 1 approval authority.
- If the condition USD5000 <= REQUISITION_AMOUNT < USD9000 is met, then require approvals up to at least level 2 approval authority.

Example

Name	Job	Approval Authority
Meredith Walton	Buyer	1
Pat Stock	Manager	2
Casey Brown	Executive	3
Connie Horton (in the IT approval group)	IT Manager	4

In this example:

1. If the condition 0 USD <= REQUISITION_TOTAL <= 100 USD is met, then require approvals up to at least level 1.
2. If the condition 1000 USD < REQUISITION_TOTAL <= 25000 USD is met, then require approvals up to at least level 2.
3. If the condition ITEM_CATEGORY in {IT.EQUIPMENT...} is met, then require post-approval from IT approval group.

Provided AME Attributes:

Oracle iProcurement provides the following kinds of AME attributes:

- AME mandatory attributes
- AME non-mandatory header attributes

- AME non-mandatory line attributes

The attributes that Oracle iProcurement provides for use by AME are listed and described in the tables that follow.

AME Mandatory Attributes

Mandatory Attribute Name	Attribute Type	Attribute Description	Static Usage?
ALLOW_DELETING_RULE_GENERATED_APPROVERS	Boolean	Requisition preparer allowed to delete system-generated approvers? The value is derived from POR: System Approvers Are Mandatory, for the user or responsibility. It determines whether the user can delete mandatory approvers from the system-generated approver list during checkout.	No
ALLOW_REQUESTOR_APPROVAL	Boolean	Determines if preparer can approve own requisitions if preparer has enough approval authority. The value is derived from the document type setup for the requisition (Purchase, Internal, or Change Order Request).	No
AT_LEAST_ONE_RULE_MUST_APPLY	Boolean	AME raise exception when no rules apply to a transaction?	Yes
EFFECTIVE_RULE_DATE	Date	Date used to determine active rules. The default provided value assumes every rule is effective.	Yes
EVALUATE_PRIORITIES_PER_LINE_ITEM	Boolean	Determines whether to evaluate rule priorities per line item under strict line-item evaluation	Yes
REJECTION_RESPONSE	String	How AME responds to a rejection	Yes

Mandatory Attribute Name	Attribute Type	Attribute Description	Static Usage?
USE_RESTRICTIVE_LINE_ITEM_EVALUATION	Boolean	Determines whether to require that the same line item satisfy all line-item conditions in a given rule	Yes
USE_WORKFLOW	Boolean	Determines whether Oracle Approval Manager should log exceptions to the workflow context stack	
WORKFLOW_ITEM_KEY	String	Requisition approval workflow's item key	No
WORKFLOW_ITEM_TYPE	String	Workflow item type	No

AME Non-Mandatory Header Attributes

Non-Mandatory Header Attribute Name	Attribute Type	Attribute Description	Static Usage?
REQUISITION_ TOTAL	Currency	Total of all requisition lines that have not been canceled, given in the functional currency. Conversion method is derived from POR: Default Currency Conversion Rate Type for the user. General Ledger currency conversion must be enabled.	No
JOB_LEVEL_NON_ DEFAULT_START ING_POINT_ PERSON_ID	Number	Person ID of non-default first approver for job-level authority approval types	Yes
INCLUDE_ALL_JOB_ LEVEL_APPROVERS	Boolean	Determines whether to include all approvers at a given job level	Yes
TRANSACTION_ DATE	Date	Date when requisition was created	No
TRANSACTION_ GROUP_ID	Number	Business group identifier (ID) of the requisition preparer	No
TRANSACTION_ ORG_ID	Number	Operating unit in which the requisition was created	No
TRANSACTION_ REQUESTOR_ PERSON_ID	Number	Person ID of the requisition preparer	No
TRANSACTION_ REQUESTER_USER_ ID	Number	User ID of the person initiating the transaction	No
TRANSACTION_ SET_OF_BOOKS_ID	Number	ID of the set of books that owns the transaction. The value is derived from the Financials System Parameters for the operating unit.	No

AME Non-Mandatory Line Attributes

Non-Mandatory Line Attribute Name	Attribute Type	Attribute Description	Static Usage?
PO_NATURAL_ACCOUNT	String	Natural Account: Segment of the accounting flexfield that is specified as the Natural Account Segment. The value is derived from the natural account segments for the charge accounts specified on the requisition line distributions.	No
PO_COST_CENTER	String	Cost Center: Segment of the accounting flexfield that is specified as the Cost Center Segment. The value is derived from the cost center segments for the charge accounts specified on the requisition line distributions.	No
ITEM_NUMBER	String	Item Number: Item number composed by concatenating all segments defined on the Item key flexfield. The value is derived from the item number associated with the requisition line.	No

Non-Mandatory Line Attribute Name	Attribute Type	Attribute Description	Static Usage?
ITEM_CATEGORY	String	Item Category: Item category composed by concatenating all segments defined on the Item Category key flexfield. The value is derived from the item category associated with the requisition line.	No
DELIVER_TO_LOCATION	String	Deliver-to Location: The value is derived from the deliver-to location specified on the requisition line. The value is the location code in the database base language. (AME does not use multi-lingual support that is provided in the Oracle Applications setup windows.)	No

Note: A requisition has a header, lines, and distributions. AME does not support three levels of attributes. Therefore, the definition of a line is a combination of the line and distribution information. For example, a requisition line with two distributions is considered as two lines in AME approvals.

Profile Options

The following profile options affect the approval process in Oracle iProcurement:

- PO: Allow Requisition Approval Forward Action
- PO: Workflow Processing Mode
- POR: System Approvers are Mandatory

For details, see Set Profile Options, page 2-38.

Function Security

There are a number of functions that control the approval process, such as whether to permit requesters to add approvers. See a list of the functions relating to the Approvals Status page and the Approvers and Add Approvers page, in Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

There is one workflow attribute that can be modified in the requisition approval workflow, if you do not want to accept the default setting. For details, see *Customize Workflows*, page 2-22.

Implementation Considerations

No additional considerations.

Global Approver

As requisitions are created in Oracle iProcurement and approval paths are generated, the list of approvers can be set up to include employees belonging to different business groups. For example, it is possible for requester A from business group 1 to have his or her requisition routed to approver B from business group 2. In addition, approvers from different business groups can be manually inserted into the approval list. As such, the list of values for approvers can include a column containing the business group of each potential approver.

Approvers can view the requisition details from the notifications pages, even if the requisition was created in a different operating unit. Requisitions that were created in a different operating unit will not be available through the general requisition status pages nor will they be available for modification. The approval action history display includes business group information for each approver.

Setup Steps

Set the profile option HR: Cross Business Groups to Yes before you set up your approval hierarchy, if any approvers in the hierarchy will be employees in different business groups.

Profile Options

HR: Cross Business Groups

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Requisition Changes

A requester in Oracle iProcurement can change a requisition after it has been submitted. The requisition can be changed at any time prior to its conversion to a purchase order, even though it currently is in an approver's notifications list. When

the requisition is in the change process, it will be removed from the current approvers' notification list. (It is withdrawn from the approval process.)

Note: A different change process occurs if the requisition line has been placed on an approved purchase order. See Requester-Initiated Changes to Purchase Orders, page 5-56.

Setup Steps

None

Profile Options

None

Function Security

Requisition Withdrawal is controlled by the function View My Reqs Withdraw. See Set Up Function, Menu, and Data Security, page 2- 8 .

Note: When choosing Change, the requester is taken to the shopping cart so that changes can be made.

Workflow

If the PO Create Documents workflow is running in background mode, there is potentially a longer window of opportunity for requesters to make changes before the requisition is converted to a purchase order.

The PO Requisition Approval workflow (also known as the Requisition workflow) handles the withdrawal of the changed requisition from the requisition approval process. For example, a requisition's approval list consists of approvers 1, 2, 3, and 4. When the approval is between approvers 2 and 3, the requester changes the requisition. The workflow withdraws the requisition as soon as the requester clicks the Change button. Approvers 3 and 4 never receive a notification request for approval. Once the requester makes the changes and submits the requisition, approvers 1, 2, 3, and 4 receive a notification request for approval, as they would for any other requisition.

See Customize Workflows, page 2-22.

Implementation Considerations

Either requesters or approvers can make changes to requisitions.

Requester-Initiated Changes

- The change feature was formerly known as Requisition Withdrawal, and the Withdraw button has been replaced by the Change button.
- There is a single Change button, which depending on the status of the requisition will launch the requester into either of the following flows:
 - Change Requisition flow (when no lines are placed on a purchase order). The requester can directly change the entire requisition or select and change individual lines on the requisition. No buyer approval is needed.

- Requester Change Order Request flow (when at least one line is placed on a purchase order). For the lines placed on a purchase order, the requester can request changes, which will have to be approved by the buyer on the purchase order. See Requester-Initiated Changes to Purchase Orders, page 5-56.

Approver-Initiated Changes

The approver can also make changes to a requisition while approving it. The approver can add, delete, or modify the requisition lines. When finished, the approver checks out the requisition again. The checkout is initiated from a special Approver Shopping Cart. (For details, see the online Help.)

In some cases, the approver checkout process assumes the requisition preparer's information; in other cases, the approver's. These assumptions are taken during defaulting and validation. For example, if the approver adds a line to the requisition, the Need-By Date defaults from the preparer's preferences, not the approver's. In the Approver Shopping Cart and checkout process, all requisition lines (even the unchanged ones) are validated again. For example, the system checks whether the account information on the requisition is still valid.

The following table summarizes which information (both defaulting and validation) assumes the preparer and which the approver during the approver checkout.

Information	Preparer or Approver
Oracle Applications Framework personalization and page functions	Approver
Function security	Approver
Favorite charge accounts list	Approver
General preferences, such as Date Format	Approver
iProcurement preferences, such as Need-By Date Offset	Preparer
Billing and encumbrance, such as list of valid projects and tasks	Preparer
Validation (for example, that the account information is still valid)	Preparer
P-card and p-card profile	Preparer
Delivery related profile options such as ICX: Override Requester	Preparer
Account generation, if the account cannot be retrieved from the item or preparer's user definition in the People window	Approver

Requester-Initiated Changes to Purchase Orders

Requester-initiated amendments to purchase orders can often be time-consuming and labor-intensive. Oracle iProcurement supports a streamlined and self-service process for

making amendments. Requesters can request line cancellations, changes to the order quantity or amount, need-by date, and, under some conditions, price. This capability complements the requisition change feature. Once submitted and approved, the Purchasing organization retains appropriate controls and can accept or reject proposed changes. As expected, material changes to the purchase order result in both a new revision and an immediate supplier notification.

This feature provides the Oracle iProcurement requester the ability to request attribute changes and line cancellations to purchase orders that have been created from the requisition. The following attributes on the purchase order lines are available for changes:

- Need-by Date
- Quantity ordered
- Price for non-catalog request items
- Cancel purchase order line
- Amount (on contractor requests or fixed price service lines)
- Start Date on contractor requests
- End Date on contractor requests

Before the change request is sent to the buyer on the purchase order for processing, the change request may have to be approved by the Oracle iProcurement requester's approval hierarchy. There is a workflow, PO Change Request Tolerance Check, which can be customized to include the business rules under which the change request needs to be manually approved by the Oracle iProcurement requester's approval hierarchy. Otherwise the change request will be automatically approved and be sent to the buyer on the purchase order.

The buyer on the purchase order can approve or reject the change request using a notification, the Purchase Order Summary window (selecting Respond to Changes from the Tools menu), or a self-service screen accessed from the Pending Purchase Order Changes menu in Oracle Purchasing. The buyer for the requester's purchase order needs to accept the change request, after which the values on both the purchase order and the requisition are updated. The Oracle iProcurement requester can track the progress of the change request using the **Change History** page. (View the requisition details. If the requisition was placed on a purchase order when the changes were made, then a Change History link will be available.)

Setup Steps

Whenever the requester initiates a purchase order change order request, the change order request document gets routed through the Oracle iProcurement requester's approval hierarchy. Since the requisition document has already been through the approval hierarchy at least once before, some customers would not want the change order request to be re-routed through the approval process and others would. The PO Change Request Tolerance Check workflow package provides the administrator the ability to control which changes to the attributes in the order request require manual reapproval and which would not require manual reapproval (get automatically re-approved).

Using the workflow package, the administrator can define an Upper Tolerance limit and a Lower Tolerance limit for all these attributes in the PO Change Request Tolerance Check workflow. If the attribute change requested by the Oracle iProcurement requester

lies within the upper and a lower tolerance limit, then the change request does not require a manual reapproval from the Oracle iProcurement requester's approval hierarchy. Otherwise, the change request requires a manual reapproval from the Oracle iProcurement requester's approval hierarchy.

For each of these attributes, seeded values are available for the Upper Tolerance Limit and Lower Tolerance Limit. The administrator can change these values to suit their business requirements. See *Customize Workflows*, page 2-22.

Profile Options

None

Function Security

This feature is controlled by functions View my Reqs Change Order and View Reqs Change Order History. See *Set Up Function, Menu, and Data Security*, page 2- 8 .

Workflow

See *Customize Workflows*, page 2-22 for full details on the PO Change Request Tolerance Check workflow.

Implementation Considerations

- There is a single Change button which depending on the status of the requisition will launch the requester into either of the following flows:
 - Requester Change Order Request flow (when at least one line is placed on a purchase order). The requester can request changes to any line on the requisition that is placed on a purchase order; all changes must be approved by the buyer on the purchase order. For lines on this requisition that are not placed on a purchase order, the requester can cancel the line without buyer approval, but not change the line.
 - Change Requisition flow (when no lines are placed on a purchase order). The requester can directly change the entire requisition or select and change individual lines on the requisition. Buyer approval is not required.
- At any given time, there can be only a single change request pending per requisition. Until the pending change request is completely acted upon, the requester cannot request any new purchase order (PO) change requests for the requisition.
- Only the preparer of the requisition can request purchase order change requests for the requisition.
- If a purchase order line contains multiple distributions corresponding to the different requisition lines, then the purchase order line is not eligible for change request and none of the Oracle iProcurement requesters who prepared the requisitions can request changes to the purchase order.
- If the purchase order has any approval status other than *Approved*, then the purchase order is not eligible for a change request and none of the Oracle iProcurement requesters who prepared the requisitions associated with the purchase order can request changes to the purchase order.

- If the purchase order has any control status other than Closed for Receiving or Closed for Invoicing, then the purchase order is not eligible for a change request and none of the Oracle iProcurement user who prepared the requisitions associated with the purchase order can request changes to the purchase order.
- If the purchase order shipment has a control status other than Closed for Receiving or Closed for Invoicing, then the purchase order shipment is not eligible for a change request and none of the Oracle iProcurement requester who prepared the requisition lines associated with the purchase order shipment can request changes to the purchase order shipment.
- Price changes for non-catalog request items are not allowed for Partially Invoiced, Received, or Accrue on Receipt purchase orders, if the profile option PO: Allow Retroactive Pricing of POs is set to NEVER or OPEN RELEASES. If the profile option is set to ALL RELEASES, then the price changes are allowed, even for Partially Invoiced, Received, or Accrue on Receipt purchase orders.
- When the purchase order line contains a non-catalog request item in a foreign currency, the Oracle iProcurement requester can request a price change for that item in both the foreign currency of the item as well as the functional currency for the operating unit. In case of a price change request in the foreign currency of the item, the conversion rate used for the change request is the same as the one used at the time of purchase order creation.
- While the purchase order change request is being approved in the Oracle iProcurement requester's approval hierarchy, if the purchase order becomes ineligible for change (purchase order goes into a Cancelled control status), then the purchase order change request is automatically rejected. The buyer does not receive the notification to process the change request, nor does the change request appear in the buyer self-service screen.
- After the purchase order change request has been approved in the Oracle iProcurement requester's approval hierarchy and before the request is sent to the buyer on the purchase order for processing, a check is made to compare the requested values for the attributes on the change request and the current values on the purchase order. If these values are same, then the purchase order change request is automatically accepted. The buyer does not receive the notification to approve the change request, nor will the request appear in the buyer self-service screen.
- While the purchase order change request is being approved in the Oracle iProcurement requester's approval hierarchy, if the purchase order goes into an *In Process* approval status or a *Requires Re-approval* status, then the purchase order change request is deferred and is not sent to the buyer until the purchase order is in the *Approved* status.
- Encumbrance support (if enabled) is available for the change request. When the requester is creating the purchase order change request in Oracle iProcurement, the encumbrance funds check is performed for the revised requisition document total if there is a change (increase or decrease) to the document total. The actual funds reservation is performed after the buyer responds to the purchase order change request.
- Tax support is available for the change request. While submitting the change request, the estimated tax applicable to the requisition is recomputed based on the revised requisition document total.

- If there are price breaks applicable to the purchase order based on the changes requested by the requester, those are applied to the purchase order.

Requisition Cancellations

This feature provides the Oracle iProcurement requester with the capability to select and cancel individual requisition lines (in addition to the entire requisition), before they are placed on a purchase order or a sales order.

Note: After the requisition lines are placed on an order, a cancellation triggers the requester change order process. See Requester-Initiated Changes to Purchase Orders, page 5-56.

Setup Steps

Enabling the function security for a requester (see list below) enables the requester to select and cancel individual lines (including all lines on the requisition, which would be equivalent to canceling the entire requisition).

Profile Options

None

Function Security

The ability to cancel requisitions is controlled by functions View my Reqs Cancel, View All Reqs Cancel, and View My Group's Reqs Cancel.

See Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

- There is a single Cancel Requisition button which, depending on the status of the requisition, will launch the requester into either of the following flows:
 - Requester Cancel Order Request flow (when at least one line is placed on a purchase order). For the lines placed on a purchase order, you can request cancellations, which will have to be approved by the buyer on the purchase order. For lines that are not placed on the purchase order, the requester can directly cancel the line, and no buyer approval is required.
 - Cancel Requisition flow (when no lines are placed on a purchase order). The requester can directly cancel the entire requisition or select and cancel individual lines on the requisition. Buyer approval is not required.
- You cannot cancel internal requisition lines after they have been linked to an internal sales order, unless the corresponding sales order is also canceled. If the sales order has already been canceled, then you can cancel the corresponding internal requisition lines.

Lifecycle Tracking

Requesters can view the following information when they click the Details icon for a requisition line, as the information is updated:

- Negotiation. If your company uses Oracle Sourcing, then the buyer may have placed the requisition lines on a negotiation (such as reverse auction). If so, requesters can view the associated negotiation.
- Purchase order. Once the requisition is converted to a purchase order, the requester can view the associated purchase order and purchase order status. The requester can view only those purchase order lines with at least one distribution that is associated with the requisition line.

Note: Although Oracle iSupplier Portal is used to display the purchase order details, you do not have to install or set up Oracle iSupplier Portal.

- Sales order. For internal requisitions, the requester can view the associated sales order number.

Note: Requesters can view the sales order number, but not click the number to see the sales order details.

- Shipment. If the supplier sends Advance Shipment Notices (ASNs), then the ASN information, such as Tracking Number, displays. If Oracle Transportation Execution is installed and implemented, then requesters can also track the progress of the shipment by the carrier.
- Receipt. Once the requester or appropriate party enters a receipt for the requisitioned items, the receipt details will also display for the requisition.
- Invoice. Requesters can view the corresponding invoice created in Oracle Payables.
- Payment. Requesters can view the corresponding payment created in Oracle Payables.
- Timecard. If Oracle Services Procurement is implemented, then requesters can view the contractor's approved timecard, if Oracle Time & Labor is also implemented.

Requisitions Page: Details Icon

ORACLE iProcurement

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Requisitions

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Requisition 100162

[Copy To Cart](#)


[Cancel Requisition](#)

[Change](#)

Description **Testing Location**
Created By **Smith, Mr. Jonathan**
Creation Date **03-Sep-2004 00:03:09**
Deliver-To **3455 108th Ave Seattle, King,
WA, 98101**
Justification

Status Approved
Change History **No**
Urgent Requisition **No**
Attachment **None**
Note to Buyer

Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order	Purchasing Organization
1	Testing Location	04-Sep-2004 12:30:00	Seattle Maintenance	Each	5	100.00 USD	500.00			
Total							500.00			

[Return](#)

[Copy To Cart](#)

[Cancel Requisition](#)

[Change](#)

Click icon to see line details,
including lifecycle information

Requisition Line Details: Lifecycle Tracking

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[Requisitions: Requisitions](#) > [Requisitions Search](#) > [Requisition 5892](#) >

Requisition 5892 Line 1: Details

OK

Requisition

Description **Paper - requires 2-way match office supply item** Current Approver
 Status [Approved](#) Approver Phone
 Change History **No** Date Sent to Approver
[▶ Show Additional Information](#)

Order

Order [11412](#) Status **Approved**
 Buyer **Vusirikala, Mr. Raju** Buyer Phone
 Purchasing Organization **Vision Operations** Supplier Site **RVSITE**
 Supplier **Raju Supplier mfg** Supplier Phone
 Supplier Contact

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
33000	25-MAR-2002	30-MAR-2002	United Parcel Service (UPS)	1Z1RST345167883SX10P48	60
35000	30-MAR-2002	05-APR-2002	Federal Express	QD1954HDO53678DHKL19	60

Receipt

Receipt	Transaction Date	Net Quantity Received	Received By	Received By Phone	Items Returned
3300	04-APR-2002		10 Glenn, Mr. Tony	(650) 506-1200	No
3400	10-APR-2002		15 Green, Ms. Rachel	(650) 506-1200	Yes

Invoice

Details	Invoice	Description	Payment Status	Creation Date	On Hold Status	Invoice Amount (USD)	Amount Due (USD)	Due Date
▶ Show	3300	Invoice for PO 30000	Paid	14-APR-2002	On Hold	1000.00	200.00	31-MAR-2003

TIP Invoice amounts shown may include items other than the requested item.

Payment

Payment	Status	Payment Date	Payment Amount (USD)	Cleared Date	Payment Method	Bank
3000	Stop Initiated	14-APR-2002	800.00	05-APR-2003	Check	Bank of America

TIP Payment amounts shown may include items other than the requested item.

OK

There is no setup required for displaying the procure-to-pay lifecycle details, except for the shipment information. For example, if you use Oracle Payables to create the invoice and match the invoice to the purchase order that corresponds to the requisition line, then the invoice displays. If the information, such as the invoice or payment, has been created in Oracle Applications for the requisition line, then it displays.

Setup Steps

The following steps show what needs to happen to display shipment information for a requisition line.

Requisition Line Details: Shipment Tracking

Shipment

Shipment	Shipment Date	Expected Receipt Date	Freight Carrier	Tracking Number	Track Shipment
33000	25-MAR-2002	30-MAR-2002	United Parcel Service (UPS)	1Z1RST345167883SX1OP48	
35000	30-MAR-2002	05-APR-2002	Federal Express	QD1954HDO53678DHKL19	

In the shipment details, the Shipment number, Shipment Date, Expected Receipt Date, and (optional) Freight Carrier come from the ASN that the supplier sends to Oracle Purchasing or enters in Oracle iSupplier Portal. The Track Shipment icon displays if a link is set up to the carrier; a Tracking Number displays if the carrier is set up to find the shipment by tracking number.

If ASNs are not used and carrier setup has not been performed, then the Shipment section displays with the text "No data exists."

To set up a carrier (optional):

1. Log on to Oracle Applications using the Procure-to-Pay Administrator responsibility.
2. Use the following navigation: Purchasing Setup > Shipment Tracking Setup.
3. See the *Oracle Transportation Execution Implementation Manual* for instructions on setting up a carrier and a carrier URL.

The URL that you set up is accessed when the requester clicks the Track Shipment icon. If you have chosen a Tracking Number as your lookup parameter during this setup, then the Tracking Number is used to display that shipment's information at the carrier's URL.

To populate the shipment details (optional):

1. A purchase order for the requisition line has to be created in Oracle Purchasing.
2. The supplier has to respond to the purchase order with an ASN. The supplier can send the ASN electronically to Oracle Purchasing, which uses the Receiving Open Interface to process the ASN, or the supplier can use Oracle iSupplier Portal to enter the ASN.

The Shipment number, Shipment Date, and Expected Receipt Date are required on the ASN. Freight Carrier is optional. Waybill/Airbill Number is optional; if provided, it displays as the Tracking Number in Oracle iProcurement. These are the only fields from the ASN that display in the shipment details in Oracle iProcurement.

3. To display or update the shipment details, run the Receiving Transaction Processor:
 - Log on using the Oracle Purchasing responsibility.
 - Navigate to Requests to open the Submit a New Request window.
 - Submit the Receiving Transaction Processor request.
 - Make sure the request completed successfully.

Profile Options

None

Function Security

View Purchase Order Internal (POS_VIEW_ORDER_INT) controls whether the requester can click the purchase order number and view the purchase order. This function is an Oracle iSupplier Portal function; it is already included in the default-provided Internet Procurement responsibility.

Order Number: Linked for Access to Purchase Order

ORACLE[®] iProcurement Shopping Cart Home Logout Preferences Help

Shop **Requisitions** Receiving Contractors

Requisitions | Notifications | Approvals Search

Views
View: All My Requisitions Go

Indicates requisition with a pending change request.

Select requisition: Copy To Cart Cancel Requisition Change Complete Previous 10 11-20 Next 10

Select	Requisition	Description	Total (USD)	Creation Date	Status	Order
<input type="radio"/>	100143		1,645,756.00	26-Aug-2004 17:10:13	Approved	1191-184
<input type="radio"/>	100144		38,328.64	26-Aug-2004 17:10:13	Approved	1596-30
<input type="radio"/>	100147		526,176.00	26-Aug-2004 17:10:13	Approved	1191-184
<input type="radio"/>	100149		70,780.90	26-Aug-2004 17:10:13	Approved	
<input type="radio"/>	100146		230,300.00	26-Aug-2004 17:10:13	Approved	
<input type="radio"/>	100145		113,274.00	26-Aug-2004 17:10:13	Approved	1596-30

View Receipts (POR_SHOW_VIEW_RECEIPTS) and View All Receipts (POR_SHOW_ALL_RECEIPTS) control whether the requester can view the Receipt section of the lifecycle details. (The Receipt section will be shown if at least one of these functions is assigned to the requester's responsibility.)

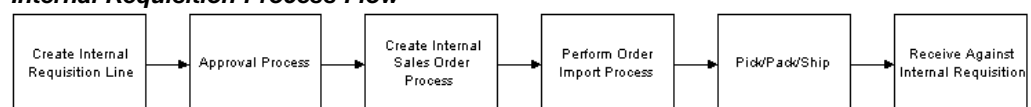
Implementation Considerations

No additional considerations.

Internal Requisitions

In a buying organization, goods are sourced either from external suppliers or from internal inventory and warehouse locations. Externally sourced items are requested using purchase requisitions. Items sourced from an internal source are requested using internal requisitions. Internal requisition creation is supported in Oracle iProcurement. Internal requisitions are not converted into purchasing documents (purchase orders or blanket releases). Rather, internal requisitions are converted into internal sales orders. These internal sales orders are subsequently processed, and the requested items can be received in Oracle iProcurement. A summary diagram of the process is provided below:

Internal Requisition Process Flow



Overall Setup Steps for Internal Requisitions

See the section Overview of Internal Requisitions in the *Oracle Purchasing User's Guide*.

Manual Source Selection

The ability to manually select source information is available through the **Select Item Source** page (accessed by clicking the "Click here to select a source" link) from one of the following pages:

- **Search Results**
- **Compare Items**
- **Item Details**
- **Shopping List: Personal Favorites**
- **Shopping List: public list items**

Selecting a Source: Search Results Page

Search Results from All Local Content: %int%

Sort by

8-14

[Printer Mechansim](#)

Category: **Misc** Supplier: Supplier Site:
Supplier Item: Internal Item Number: **75100101** Contract Number:
Price: **10.00 USD** Unit: **Each**

Quantity

This item is internally stocked. [Click here to select a source.](#)

The figure above shows an internal item for which the link "Click here to select a source" displays. This link displays if POR: Allow Manual Selection of Source is set to Yes and if PO: Legal Requisition Type is set to Internal or Both.

Select Item Source Page

Select Item Source

The selected item can be supplied by the sources listed below. Confirm or modify the suggested source before proceeding.

Cancel

Add to Cart

Item Description **Printer Mechansim**
Internal Item Number **75100101**
Category Description **Miscellaneous**

Item Sources

Select	Source	Supplier/Organization	Supplier Site	Subinventory (Quantity)	Unit	Price (USD)
<input checked="" type="radio"/>	External	To Be Determined			Each	10.00
<input type="radio"/>	Internal	Vision Operations		Mobile B(0) ▾	Each	0.00
<input type="radio"/>	Internal	Boston Manufacturing		FGI(1000) ▾	Each	31.35

Cancel

Add to Cart

The figure above shows how the requester can select an external or internal source for the item on the **Select Item Source** page. This page appears after clicking the link "Click here to select a source" on the **Search Results** page. In this example, the requester has a choice among an external source or two internal sources. For each internal source, the subinventory location and available quantity are given.

Source Subinventory

In addition to Oracle iProcurement determining the source organization, the source subinventory is also defaulted. When sourcing is automatic and transparent, and the source is determined to be an internal organization, the subinventory that is reservable and that has the greatest available inventory is selected. If multiple subinventories have equal available inventory, then the first subinventory alphabetically is defaulted. If all subinventories have zero available inventory, then no subinventory is defaulted. The available inventory figure is an estimate only and is defined as:

[INVENTORY ON HAND - RESERVED INVENTORY IN SUBINVENTORY]

Note: If inventory is reserved without an indication of subinventory, then that reservation is not included in the available inventory calculation.

When requesters manually select the source information, all available subinventories that are enabled for quantity tracking are displayed in a drop down box. The available inventory per subinventory is shown along side the subinventory value in the drop down box. The inventory is only an estimate and may not be valid at the time of order fulfillment.

Checkout and Validation (Mixed Lines)

It is possible to include both internally sourced and supplier sourced lines on a single requisition. However, because of additional constraints for internally sourced lines, during checkout extra validation is performed on the internally sourced lines. A comparison of the checkout validation between supplier-sourced lines and internally sourced lines is given in the table below:

Item Checkout Validation

Field / Attribute	Supplier-Sourced Line	Internally Sourced Line
Deliver-to Location	Item must belong to the organization associated with the deliver-to location	<ol style="list-style-type: none">1. Item must belong to the organization associated with the deliver-to location.2. The location must be associated with a customer.3. There is a valid shipping network between the source inventory organization and the destination inventory organization (deliver-to organization).
One-Time Address	None	Cannot deliver internally sourced items to a one-time address.
Requester	None	New requester cannot result in a new deliver-to location that infringes on the above deliver-to location rules.
Buyer	None	Buyer cannot be entered.
Charge Account	Non-modifiable if destination is inventory.	<ol style="list-style-type: none">1. Non-modifiable if destination is inventory.2. If destination is expense, cannot allocate to multiple charge accounts.

It is possible to create internal requisitions for both expense and inventory destinations.

At the end of the checkout process a single requisition, containing both internal and external lines is created. This requisition is then routed through the same approval path as a requisition with all purchase requisition lines. Upon approval, the internally sourced lines are converted into internal sales orders and the externally sourced lines are converted into purchasing documents (purchase orders or blanket releases).

It is possible to receive internal orders in Oracle iProcurement. See Receipt Creation, page 6- 2 for details.

Profile Options

The following profile options must be evaluated when implementing this feature. See Set Profile Options, page 2-38 for complete profile setup instructions.

- PO: Legal Requisition Type
- POR: Allow Manual Selection of Source
- POR: Select Internal Requisition for Confirm Receipts
- POR: Select Inventory Replenishment Lines for Confirm Receipts
- MRP: Default Sourcing Assignment Set

Function Security

None

Workflow

The Confirm Receipts workflow has been modified so that past due shipments for internal requisitions can be selected.

Implementation Considerations

- Purchasing sourcing is only called and applied when an internally orderable item is selected. If a strictly purchasable item is selected, then no sourcing is applied.
- If the profile PO: Legal Requisition Type = Internal then the following are true:
 - It is not possible to sort by unit price.
 - Strictly purchasable items are not displayed.
 - Displaying the "Click here to select a source" link depends on the setting of the profile POR: Allow Manual Selection of Source.
 - Items which are both purchasable and internally orderable are only displayed as internally orderable.
 - All prices on the catalog pages are null.
- If the profile PO: Legal Requisition Type is set to Purchase, then the following are true:
 - The "Click here to select a source" link does not display regardless of the setting of the profile POR: Allow Manual Selection of Source.
 - No sourcing is called.
- If the profile PO: Legal Requisition Type is set to Both, then the following are true:
 - Display of the "Click here to select a source" link depends on the setting of the profile POR: Allow Manual Selection of Source.
 - If both internal and external items have been extracted into the catalog, then both item types are displayed.
- When an item is internally sourced, the unit of issue from the destination organization is used. The transfer price is calculated based on the cost price of the source organization and the unit of measure conversion rates.
- General planning information is not used when determining the source for a given item. All sourcing is based on the sourcing rules defined.
- If a requisition has both internally and externally sourced lines and the delivery information is changed at the header level, then the deliver-to location validation is different for each line type. The list of values for the deliver-to location provides a list of all deliver-to locations. If a location that is invalid for internal line items is selected, then an error message is displayed for the internal line item. Requesters must select a valid location for the line before proceeding.
- It is not possible to add information templates to internally sourced lines.

- It is not possible to modify the source information during checkout. To modify the source, requesters have to delete the item from the shopping cart and then re-select the item from the catalog.
- The source defined on a requisition template (public list) is not used when the source is determined by Oracle iProcurement. Sourcing is strictly based on sourcing rules.

Oracle Services Procurement

Oracle Purchasing includes the following line types that are also used by Oracle iProcurement:

- Quantity-based, or Goods (for example, 10 books at 5 USD each; the price is 5 and the quantity is 10 on the purchase order)
- Amount-based (for example, 500 USD for a service; the price is 1 and the quantity is 500 on the purchase order)

Oracle Services Procurement, if licensed and implemented, provides the following additional line types:

- Fixed price service (for example, 500 USD for a service; the amount is 500 on the purchase order; a quantity is not required)
- Rate-based temporary labor (for example, a contractor at 100 USD per hour; on the purchase order, the rate is 100 in the price field, the UOM is hour, and the amount is the agreed-upon amount for the labor, plus any additional amount to cover rate differentials such as overtime and weekend time)
- Fixed price temporary labor (for example, consulting at a fixed 15,000 USD for the labor)

Line types are determined based on their Purchase Basis and Value Basis in the Line Types window in Oracle Purchasing. In summary, the default line types are as follows, depending on whether Oracle Services Procurement is licensed and implemented:

Purchase and Value Basis of Provided Line Types

Line Type	Purchase Basis	Value Basis	Oracle Services Procurement Required?
Goods	Goods	Quantity	No
Services (Amount-Based)	Services	Amount	No
Fixed Price Services	Services	Fixed Price	Yes
Rate-Based Temp Labor	Temp Labor	Rate	Yes
Fixed Price Temp Labor	Temp Labor	Fixed Price	Yes

Creating the Requests

Oracle iProcurement can requisition fixed price services by using a non-catalog request. Oracle iProcurement requisitions temporary labor by using a contractor request.

Note: Oracle iProcurement is the only application in which you can create a temporary labor request.

Non-Catalog Request

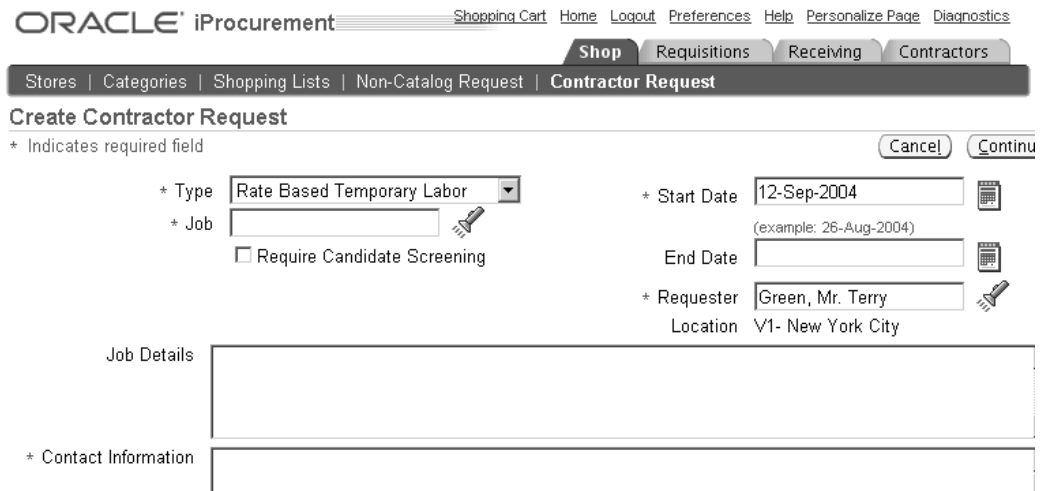


The screenshot shows the 'Non-Catalog Request Store' interface. At the top, there is a breadcrumb trail: 'Stores | Categories | Shopping Lists | Non-Catalog Request'. Below this is the title 'Non-catalog Request Store'. A note indicates that an asterisk (*) denotes a required field. The form contains the following fields:

- Request Type:** A dropdown menu with 'New' selected.
- Item Type:** A dropdown menu with 'Goods billed by quantity' selected. An information icon (i) is visible to the right.
- Item Description:** A dropdown menu with three options: 'Goods billed by quantity', 'Goods or services billed by amount' (which is highlighted), and 'Services billed by quantity'.

The figure above demonstrates the use of a non-catalog request to create requisitions for fixed price services line types. In the Item Type field, select *Goods or services billed by amount*, which uses the line type selected in the profile option POR: Amount Based Services Line Type. (The *Services billed by quantity* item type corresponds to the line type selected in the profile option POR: Rate Based Services Line Type.)

Contractor Request



The screenshot shows the 'Create Contractor Request' form in the Oracle iProcurement system. The breadcrumb trail is 'Stores | Categories | Shopping Lists | Non-Catalog Request | Contractor Request'. The form includes the following fields and options:

- Type:** A dropdown menu with 'Rate Based Temporary Labor' selected.
- Job:** A text input field with a magnifying glass icon.
- Require Candidate Screening:** An unchecked checkbox.
- Start Date:** A date input field with '12-Sep-2004' entered and a calendar icon. A note below says '(example: 26-Aug-2004)'. A 'Cancel' button is located to the left of this field.
- End Date:** A date input field with a calendar icon.
- Requester:** A text input field with 'Green, Mr. Terry' entered and a magnifying glass icon.
- Location:** A text input field with 'V1- New York City' entered.
- Job Details:** A large empty text area.
- Contact Information:** A large empty text area.

At the top right of the form, there are 'Cancel' and 'Continue' buttons.

The figure above demonstrates the use of a Contractor Request to create requisitions for rate-based or fixed-price temporary labor line types. Some of the fields you enter on a contractor request include a job and start date, and contact information.

Contractor Request Preferred Suppliers

Shop Requisitions Receiving

Stores | Categories | Shopping Lists | Non-Catalog Request | Contractor Request

Create Contractor Request

Supplier Information

Use Preferred Suppliers
 Suggest Supplier and Contractor

Select	Supplier Information
<input type="checkbox"/>	Hiring Agency V Site AVON Amount 250,000.00 USD Contact Amount Negotiable Yes Phone Amount Limit 250,000.00 USD Email Suggested Contractor First Name <input type="text"/> Fax Suggested Contractor Last Name <input type="text"/> Source Document Number 4006 Document Type Code Blanket Purchase Agreement
<input checked="" type="checkbox"/>	Note to Supplier <input type="button" value="Add Note"/>

Budget Information

* Indicates required field

* Labor Amount (USD)

Expense Amount (USD)

The figure above shows the second step of contractor request creation where amounts can be entered. If an approved supplier list (ASL) has been set up in Oracle Purchasing, then the ASL suppliers also display in a preferred supplier list, from which the requester can select a supplier.

Note: Oracle iProcurement prevents combining goods and temporary labor on the same requisition. If the requester tries to create a contractor request while there are goods in the shopping cart (or vice versa), Oracle iProcurement will guide the requester to keep these on separate requisitions.

Contractor Request Flow

Contractor requests use either of two flows:

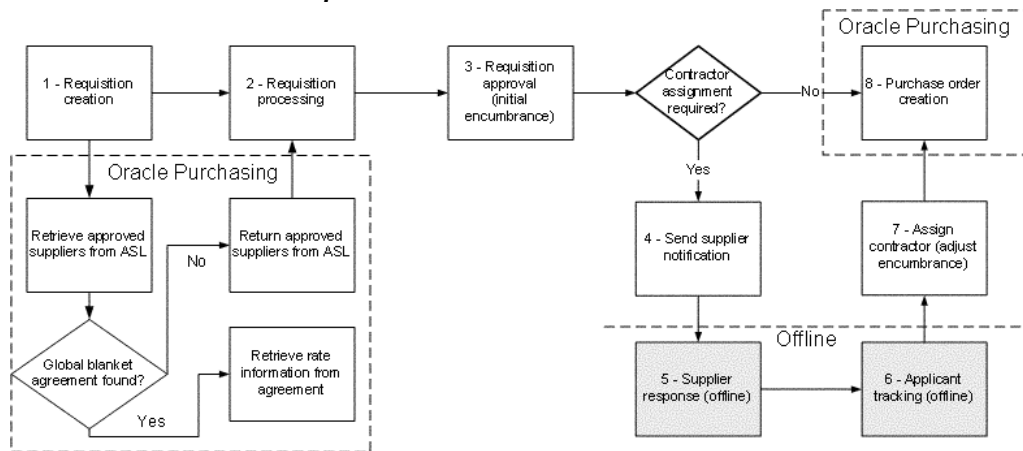
- *Fast-Track*. Also known as a *manual* request, the fast-track request results in a contractor request status of Not Applicable. This flow works like any normal requisition. The requester completes the contractor request, checks out, and receives the required approvals. In a fast-track request, typically the requester does not care who the contractor is.
- *Full-Track*. A full-track request results in a contractor status of Pending. This flow is initiated when more than one preferred supplier is selected on the contractor request, when the candidate screening option is selected on the contractor request, or

when the target rate entered on the contractor request does not equal the rate on an existing contract in Oracle Purchasing. The flow is as follows:

- Requester completes the contractor request, checks out, and receives the required approvals.
- Oracle iProcurement sends an automated notification to the supplier or suppliers on the request.
- Requester works with the supplier or suppliers offline to choose a contractor.
- Requester assigns the contractor to the requisition, changes amounts if necessary, and checks out.
- Depending on how POR: Reapproval after Contractor Assignment is set, the requisition may require reapproval.

Note: See the online Help in Oracle iProcurement for further details on the contractor requisitioning flow, contractor status, and contractor request fields.

Overview of Contractor Request Flow



The figure above shows the fast-track and full-track contractor status flows described earlier. (If contractor assignment is not required, then it is a fast-track flow. If contractor assignment is required, then it is a full-track flow.)

The figure also shows the following integration points with Oracle Purchasing: during creation and checkout, Oracle iProcurement checks whether approved supplier list (ASL) entries have been defined for the job or category (see details in Oracle iProcurement Setup, below); once the requisition is finished, Oracle Purchasing creates the purchase order.

Contractor Assignment

Name	Job Description	Requisition	Start Date	End Date	Purchase Order	Supplier	PO Amount Billed (USD)	PO Amount Remaining (USD)	Assign Contractor
	Analyst job	6288	26-Jun-2004						
	Analyst job	6249	23-Jun-2004						
	Engineering job	6233	20-Jun-2004						
	Analyst job	6033	03-Jun-2004						

The figure above shows how contractor assignment is performed in a Pending contractor request flow, in the Contractors tab. (Assignment can also be performed in the Requisitions tab. See the online Help for details.) If the Assign icon is disabled for contractors pending assignment, then the supplier has not yet been notified. Refer to the Contractor Request Flow diagram above.

Receiving against Oracle Services Procurement items consists of the following main points:

- Only fixed price services lines can be received in Oracle iProcurement.
- Rate-based temporary labor cannot be received. (Typically, it is "received" by the contractor's entering a timecard. These timecards can be converted into receipts, for accounting purposes, by submitting a process in Oracle Purchasing. If Oracle Time & Labor is installed, then the timecard icon can be viewed in the Contractors tab when viewing active and past contractors, or in the Requisitions tab when viewing the requisition line details.)
- You cannot create a return for fixed-price temporary labor or fixed-price services.

Requesters can also enter contractor performance evaluations online in Oracle iProcurement. They can also view previously entered evaluations to help them select contractors. As shown in the Contractor Assignment figure above, the Contractors tab allows contractor assignment and performance evaluations.

Expense Lines

If the requester enters an amount for the contractor's expenses (such as air travel) on the contractor request, then Oracle iProcurement treats this amount as a separate line on the requisition, numbered as shown in the following example:

Line Number	Description
1	Database administrator
1.1	Database administrator - expense
2	Executive assistant
3	Project manager
3.1	Project manager - expense

Notifications

Oracle iProcurement sends the following notifications in the contractor request flow, in addition to those sent in the standard requisition flow:

- Notification to each supplier of the request, for Pending contractor requests only. The notification states the request for a contractor and provides most of the information from the request, including the Job Details, Start Date, Rate or Amount, and any notes to the supplier that the requester entered.
- Notification to supplier that the contractor request has been canceled, if the requester canceled it.
- Notification to the requester if the supplier's e-mail address cannot be found.
- The existing notification to the requester that the requisition is now approved, is also sent in the case of an approved contractor request. For Pending contractor requests, however, the notification also reminds the requester that the requisition will require contractor assignment next.

Setup Steps

Prerequisites:

- Oracle Services Procurement license (Required)
- Oracle Purchasing (Required)
- Oracle iProcurement (Required)

Note: For additional information about Oracle Services Procurement, including supported features and product dependencies, see *About Oracle Services Procurement in Oracle Supply Management*, on [OracleMetaLink](#).

Oracle Purchasing Setup (Required):

There is some setup that must be done in Oracle Purchasing, before you can implement the services and temporary labor functionality in Oracle iProcurement. See the Oracle Services Procurement setup information in the *Oracle Purchasing User's Guide* for details.

Oracle iProcurement Setup (Required):

1. Set the following profile options:

- POR: Contractor Expense Line Type.
- POR: Reapproval after Contractor Assignment
- POR: Amount Based Services Line Types.

You may have already set the following profile options when you performed the Oracle Purchasing setup:

- PO: Enable Services Procurement
- PO: UOM Class for Temp Labor Services

See *Set Profile Options*, page 2-38.

2. Assign the Contractor Request catalog to stores. (Optional)

Requesters can always click Contractor Request directly below the Shop tab to create a contractor request. You can, however, make contractor requests additionally accessible in one or more stores. For example, you can assign the Contractor Request catalog to a store that you created. When a requester clicks the store on the **Shop** page, all of the catalogs in that store are displayed. The requester can then click the Contractor Request catalog in the store and be taken to the contractor request entry page. (If you create a store that contains only the Contractor Request catalog, then clicking the store takes the requester directly to the contractor request entry page.)

Furthermore, you can use realms to control access to the Contractor Request catalog that you add to other stores. See *Defining Realms*, page 4-44.

Log on using the iProcurement Catalog Administration responsibility and access the eContent Manager. See the online Help for more information on adding catalogs to stores.

3. Create non-catalog request templates for services. (Optional)

If desired, you can create non-catalog request templates specifically for services. When requesters create a non-catalog request, they can select the desired template. You can also assign a non-catalog request template to a services-related store, so that the requester always selects the correct template when in that store. For example, for each service type, you can define default values for certain service attributes and optionally restrict the requester from overriding defaults.

Log on using the iProcurement Catalog Administration responsibility and access the eContent Manager. See the online Help for more information on creating non-catalog request templates.

4. Define approved supplier list (ASL) entries. (Optional)

If you have defined ASL entries for the job category selected on the contractor request, then the contractor request displays them as preferred suppliers. The requester can then choose one or more preferred suppliers. If global blanket agreements are associated with the ASL entries, then the pricing information from those documents is also displayed. If contract purchase agreements are associated with the ASL entries, then the contract number is displayed. See the previous figure, *Contractor Request Preferred Suppliers*.

See the *Oracle Purchasing User's Guide* for instructions on setting up the ASL.

5. Set up supplier e-mail for temporary labor suppliers. (Required)

Provide an e-mail address for the Oracle iSupplier Portal user defined in the Users window for the supplier, supplier site, or supplier contact. See supplier registration information in the *Oracle iSupplier Portal Implementation Guide* for details.

Source Document Setup (Optional):

Temporary labor (contractor) requests in Oracle iProcurement use global blanket agreements or contract purchase agreements (global or local) for source documents. Temporary labor jobs on requisition lines can source these documents just like any other line.

1. See Chapter 3 and the *Oracle Purchasing User's Guide* for instructions on setting up agreements as source documents.
2. If desired, you can include price differentials on your global blanket agreement, at the shipment or line level. Price (or rate) differentials are overtime or holiday rates.
3. In the PO Create Documents workflow, set the following attributes to Yes, if you will be using contracts as source documents:
 - Should Contract be used to autcreate doc?
 - Should temp labor request be autosourced from contracts? (By default, this attribute is set to Yes.)

Note: Advanced pricing cannot be used for fixed price services or temporary labor line types. See Setting Up Contract Sourcing, page 3-4.

4. If you want to prevent the rate or amount from being changed by the requester on the contractor request, deselect the Price Override option on the global blanket agreement line, if you are using global blanket agreements as source documents.

Profile Options

The following profile options affect Oracle Services Procurement. For descriptions, see Set Profile Options, page 2-38.

- ICX: Days Needed By (The Start Date on the contractor request defaults based on this profile option, which is also part of the requester's iProcurement preferences.)
- PO: Amount Billed Threshold Percentage
- PO: Enable Services Procurement
- PO: Contractor Assignment Completion Warning Delay
- PO: UOM Class for Temp Labor Services
- POR: Reapproval after Contractor Assignment
- POR: Contractor Expense Line Type
- POR: Default Currency Conversion Rate Type

Note: Other standard Oracle iProcurement profile options, such as ICX: Override Location Flag, also affect Oracle Services Procurement requisitions. The list above shows those profile options that must additionally be considered if you are implementing Oracle Services Procurement.

Function Security

See the Oracle Services Procurement table of functions in Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

In the PO Create Documents workflow, you can set the following attributes to determine whether contract document sourcing occurs for temporary labor lines:

- Should Contract be used to autocreate doc? (By default, this attribute is set to No.)
- Should temp labor request be autosourced from contracts? (By default, this attribute is set to Yes. This attribute is checked only if "Should Contract be used to autocreate doc" is set to Yes.)

See PO Create Documents, page 2-23 for more details.

Implementation Considerations

Note the following implementation considerations.

Encumbrance

In Oracle Purchasing, you have the choice of encumbering a blanket purchase agreement or the requisition. For Pending contractor requests, the encumbrance is always done on the requisition. During contractor assignment, Oracle iProcurement temporarily unreserves funds. The funds are re-reserved once contractor assignment is completed.

Jobs

Oracle Human Resources jobs are specific to a business group. Therefore, the job selected on the contractor request limits the deliver-to location on the requisition to those locations that belong to the preparer's business group.

Document Sourcing

If you have set up global blanket agreement or contract purchase agreement document sourcing, then Oracle iProcurement displays the source document information in the preferred supplier list on the contractor request if the following conditions are met. (Some of these conditions apply only to blanket, not contract, agreements.)

- The source document's supplier and supplier site match a supplier and supplier site in the ASL for the selected job category.
- The start date entered on the contractor request must fall within the effective dates of the source document.
- Price break information from the source document is used, based on the deliver-to location selected on the contractor request and the date the request was created. That is, if the date that the request was created falls within the effective dates on the price break, then that price break is used.
- The line type on the source document must match the line type on the contractor request. For example, if a Type of Fixed Price Temporary Labor is selected on the contractor request, then only source document lines with this line type are displayed.

Note: Oracle iProcurement does not obtain new source document information if the requester changes the start date during contractor assignment or changes the requisition later using the Change button.

If the currency on the global blanket agreement differs from the requester's functional currency, then Oracle iProcurement uses the exchange rate in the system to perform a currency conversion. If an exchange rate cannot be found, then Oracle iProcurement uses the exchange rate determined by the profile option POR: Default Currency Conversion Rate Type.

Descriptive Flexfields

For contractor requests, descriptive flexfields do not display in the shopping cart, even if you use Oracle Applications Framework personalization to display them.

Miscellaneous

See also *About Oracle Services Procurement in Oracle Supply Chain Management*, on [OracleMetaLink](#).

This chapter describes the implementation steps specific to receiving in Oracle iProcurement.

This chapter covers the following topics:

- Receiving Setup Checklist
- Receipt Creation
- Express Receiving
- Blind Receiving
- Receiving Against Intransit Shipments
- Receiving Against Internal Requisitions
- Requisitions to Receive
- Returns
- Debit Memos for Return Transactions
- Corrections
- Viewing Receipts
- "Confirm Receipt" Notifications

Receiving Setup Checklist

Use the following checklist for all setup related to receiving. This is a checklist of all setup steps in this chapter. These steps are listed in a suggested, but not required, order.

Number	Step	Required or Optional	Information Source
1	Receipt Creation	Optional	Receipt Creation, page 6- 2
2	Express Receiving	Optional	Express Receiving, page 6- 3
3	Blind Receiving	Optional	Blind Receiving, page 6- 4
4	Receiving Against Intransit Shipments	Optional	Receiving Against Intransit Shipments, page 6- 5
5	Receiving Against Internal Requisitions	Optional	Receiving Against Internal Requisitions, page 6- 6
6	Requisitions to Receive	Optional	Requisitions to Receive, page 6- 8
7	Returns	Optional	Returns, page 6- 9
8	Debit Memos for Return Transactions	Optional	Debit Memos for Return Transactions, page 6-10
9	Corrections	Optional	Corrections, page 6-11
10	Viewing Receipts	Optional	Viewing Receipts, page 6-11
11	"Confirm Receipt" Notifications	Optional	"Confirm Receipt" Notifications, page 6-12

Receipt Creation

A requester can create receipts against orders in Oracle iProcurement. For an order to appear in the receiving module it must have a receipt routing of Direct Delivery. (You cannot create receipts against orders with a receipt routing of Standard or Inspection.) Destination types of Expense, Inventory, and Outside Processing are supported. Once a requester has selected one or more lines from an order to receive, they can enter Waybill, Packing Slip and Comment information. After submitting a receipt, a receipt confirmation number is shown for reference purposes.

Note: If the supplier has sent an Advanced Shipment Notice (ASN), then any information that the requester enters for Waybill, Packing Slip, and item and receipt Comment is ignored. Instead, this data from the ASN is used.

Setup Steps

None

Profile Options

None

Function Security

Access to the receiving feature is excluded through the function POR: Receive Orders. With the setting of this function security, the **Receiving** home page and all of its links are excluded from the requester's desktop.

The All Items to Receive function security is used to exclude a requester from creating receipts against any requisition line for which they are not the original requester. In the case where there is no requester and they are not the buyer, then they are excluded from this line. See Set Up Function, Menu, and Data Security, page 2- 8 for details on security.

Workflow

None

Implementation Considerations

No additional considerations.

Express Receiving

Using the Express Receive functionality in receiving reduces the number of receipt pages from three to one. After entering a receipt quantity the requester clicks "Express Receive" to directly receive a receipt number. The packing slip, waybill, and receipt comments fields are bypassed as well as the **Receive Items: Review and Submit** page

Note: If you are also going to use blind receiving, see Blind Receiving, page 6- 4 for details of the interaction of the express receiving and blind receiving features.

Setup Steps

None

Profile Options

The profile option POR: Support Review for Express Receive must be evaluated when implementing this feature. See Set Profile Options, page 2-38 for complete profile setup instructions.

Function Security

Access to the Express Receiving functionality can be restricted through excluding the function Express Receive. See Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

No additional considerations.

Blind Receiving

Many enterprises would like to enforce a blind receiving process for their employees (especially in the case of direct goods in a manufacturing environment). With blind receiving, a requester creating a receipt does not see the quantity ordered, quantity already received, or the default receipt quantity. This forces the person creating the receipt to count the number of items received and then enter the receipt quantity into the Quantity Received field. The receiving date and receiving quantity tolerances are ignored when blind receiving is enabled.

Setup Steps

In the Receiving Options window in Oracle Purchasing, the Allow Blind Receiving checkbox must be selected for Blind Receiving functionality to be enabled in Oracle iProcurement.

Profile Options

The profile option POR: Require Blind Receiving must be evaluated when implementing this feature. See Set Profile Options, page 2-38 for complete profile setup instructions.

Function Security

The setting of the Express Receive function security will have a receiving impact when Blind Receiving is enabled. For more information refer to the table in Implementation Considerations below. See also Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

- With the POR: Enable Blind Receiving profile set to Yes, the behavior for the **Receive Items: Select Items to Receive** page will be as follows:
 - Receipt Quantity fields to be received are not defaulted with the quantity available.
 - Quantity Received column does not appear.
 - Quantity Ordered column does not appear.
 - Tolerances (if set up) for the Receipt Date and Receipt Quantity are ignored.
- With the POR: Enable Blind Receiving profile set to No, the behavior for the **Receive Items: Select Items to Receive** page is as follows:
 - Receipt Quantity fields are defaulted with the quantity available to be received.
 - Quantity Received column appears.
 - Quantity Ordered column appears.

- Tolerances (if set up) for the Receipt Date and Receipt Quantity are enforced.
- The impact of Express Receive function security setting and the POR: Enable Blind Receiving profile is as follows:
 - The display of the Express Receive (or Receive) column in the Requisitions to Receive portlet and the Express Receive (or Receive) button on the **My Requisitions to Receive - Full List** page depends on the values for the following settings for the requester:
 - Express Receive functional security setting.
 - Value of the POR: Enable Blind Receiving profile.

The table below summarizes the behavior for the portlet and page depending on the combination of the Express Receive function security and the POR: Enable Blind Receiving profile.

Behavior of Express Receive and Blind Receiving Functionality

Setup	Express Receive functional security	POR: Enable Blind Receiving profile	Can requester Express Receive from Requisitions to Receive portlet AND Requisitions to Receive - Full List?	Can requester Express Receive from Receive Items: Select Items to Receive page?
1	Enabled	No	Yes	Yes
2	Enabled	Yes	No	Yes
3	Disabled	No	No	No
4	Disabled	Yes	No	No

Receiving Against Intransit Shipments

Intransit shipments are defined as a shipment of items from one inventory organization or supplier to a destination inventory warehouse. The goods associated with an advance shipping notice (ASN) may not yet have arrived at the destination warehouse. Intransit shipments fall into the following three categories:

- ASN shipments sent by a supplier to a customer.
- Inter-organization transfers that are created through internal requisitions. These intransit shipments also involve the transfer of inventory items from one inventory organization to another.
- Manually created intransit shipments that are processed in the Oracle Inventory module. These intransit shipments involve the transfer of inventory items from one inventory organization to another and are not supported in Oracle iProcurement receiving.

If there is an intransit shipment associated with the shipped item, then the shipment details can be viewed by the requester while receiving the item. The **Shipment Details**

page includes detailed shipment information such as Expected Receipt Date, Quantity Shipped, and Freight Terms. If multiple shipments are associated with the shipped item, then the details for all the associated shipment can be viewed.

Note: If the supplier has sent an ASN, then any information that the requester enters for Waybill, Packing Slip, and item and receipt Comment fields is ignored. Instead, this data from the ASN is used. (The ASN data does not display to the requester, but it is stored internally and ultimately gets applied to the receipt.)

Set Up Steps

None

Profile Options

The following profiles must be evaluated when implementing this feature:

- POR: Select Internal Requisition for Confirm Receipts
- POR: Select Inventory Replenishment Lines for Confirm Receipts

See Set Profile Options, page 2-38 for complete profile setup instructions.

Function Security

None

Workflow

The Confirm Receipts notification workflow selects internal requisitions that have a need-by-date that is prior to the date of when Confirm Receipts Workflow request is submitted. See information about this workflow in Customize Workflows, page 2-22 for more details.

Implementation Considerations

When receiving against a combination of multiple intransit and purchase order shipments, multiple receipts are created when required. The criteria that determines the creation of a new receipt are listed below:

- A separate receipt should be created for each supplier/inventory organization combination.
- All shipments from an ASN should always be received on the same receipt, even if the receiving is completed via multiple partial transactions. This is true even if the ASN consists of shipments from multiple purchase orders. A new receipt against the purchase order distribution should be created for any quantity that exceeds the quantity shipped on the ASN shipment.
- All shipments from an internal requisition must be received on the same receipt.

Receiving Against Internal Requisitions

Internal requisitions (internal orders) can be received in Oracle iProcurement. Once the associated internal sales order has been picked, packed, and shipped (confirmed), the

items are recorded as received in Oracle iProcurement. As with all requisitions, only those internal requisitions with a receipt routing (defined in the shipping network) of direct delivery can be received. The following restrictions exist for receiving against internal requisitions:

- Internal orders cannot be over-received.
- Internal orders cannot be returned.
- Corrections cannot be created against internal orders that are greater than the order amount.
- Internal orders delivered to an inventory destination cannot be corrected. Corrections can only be created against expense destinations.

You can confirm receipts for an internal order. A notification will be sent to the requester of the internal requisition.

Setup Steps

1. Verify that the shipping network is defined with the transfer type set to Intransit. If the transfer type is not set to Intransit, then the requested items will be automatically received into the destination organization upon shipment from the source organization.
2. Verify that the shipping network is defined with the receipt routing set to Direct Delivery. Direct Delivery must be defined in order for receipts to be recorded in Oracle iProcurement.
3. If the original requisition is being delivered to an inventory destination, verify that the destination subinventory is indicated:
 - Once the items have been shipped, the shipment number is displayed for all internal requisitions.
 - It is possible to receive against internal requisitions destined for either inventory or expense locations as long as the receipt routing is defined as Direct Delivery.

Profile Options

None

Function Security

None

Workflow

None

Implementation Considerations

No additional considerations.

Requisitions to Receive

Requesters have the ability to create one-click receipts for their requisitions directly from the **Receiving** home page. This is especially helpful in case of desktop receiving of indirect items such as office supplies. The My Requisitions To Receive portlet on the **Receiving** home page enables a receipt to be created directly against all eligible distributions on a requisition.

Requisitions to Receive



Search Items to Receive Find by Requisition Number

Receiving

Select the receiving action you want to perform.

- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

Requisitions to Receive

Click **Express Receive** to directly create receipts with the receipt values automatically defaulted.

Requisition	Requisition Description	Supplier	Order Number	Express Receive
6160	Delivery	TT Services	4502	
6159	Dell OptiPlex 170L Mini Tower Chassis	TT Services	4501	
6157	Cleaning and Maintenance - Weekly	Consolidated Supplies	4499	
4661	Advertising Services	TT Services	1528	
4568	Stop-Step 2-Step Ladder, 36 inch Top Step, 21 inch x 19-3/4 inch x 22-3/4 inch	Corporate Express Office Supply	1528	

Setup Steps

None

Profile Options

None

Function Security

POR_ALL_ITEMS_TO_RECEIVE

Workflow

None

Implementation Considerations

Note the following criteria for displaying purchase order-related requisitions in the Requisitions to Receive portlet:

- When the POR_ALL_ITEMS_TO_RECEIVE function security for the requester is enabled, Oracle iProcurement displays requisitions that were prepared by the logged-in user, as long as at least one receivable requisition distribution exists on the

requisition. In the case where the POR_ALL_ITEMS_TO_RECEIVE function security is disabled for the requester, Oracle iProcurement displays only the receivable requisitions whose requester is the same as the logged-in user.

- Only requisitions that have at least one line placed on purchase order, which meets the following criteria, are eligible to be shown in the portlet:
 - The purchase order approval status is *Approved*.
 - The quantity ordered less the quantity delivered less the quantity cancelled is greater than zero.
 - The Shipment Type is one of *Standard*, *Blanket*, or *Scheduled*.
 - The Receipt Routing for the purchase order must be set to *Direct Delivery*.
- If a purchase order was created without creating a requisition and the purchase order meets both the criteria mentioned above, the portlet will not contain such a case.
- The five most recently created requisitions that meet the above criteria are shown in the portlet. The requisitions will be sorted descending by requisition number.
- The Full List button on the portlet will take the user to the entire list of requisitions which satisfy the criteria mentioned above.

Note the following criteria for displaying internal order-related requisitions in the Requisitions to Receive portlet:

- Only internal requisitions that have at least one line placed on an internal sales order, which meet the following criteria, are eligible to be shown in the portlet:
 - The quantity ordered less the quantity delivered less the quantity cancelled is greater than zero.
 - A valid shipping network has been set up.
- The Receipt Routing for the internal sales order should be set to *Direct Delivery*.
- The Source Type Code is set to *Inventory*.

Returns

This feature enables requesters to return items to the supplier after they have received them. Returning items can be accomplished by clicking the appropriate link from the **Receiving** home page. Received items are displayed, and requesters can enter a quantity in the Return Quantity field. In addition, a reason for a return, a return material authorization number, and comments can be added to any item that is being returned. This additional information is optional. Returning items will add a transaction to the receiving history for that requisition. The new adjusted value will be visible when the requester queries the order in the view receipts section of Oracle iProcurement.

Setup Steps

None

Profile Options

None

Function Security

Excluding the Return Items function prevents requesters from creating returns against all receipts. Excluding the Return All Items function prevents requesters from creating returns against items they did not request. See the Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

No additional considerations.

Debit Memos for Return Transactions

When the Oracle iProcurement requester is creating a return transaction against the supplier this feature automatically creates a debit memo in Oracle Payables against a supplier invoice.

Setup Steps

The supplier site should be enabled for debit memo creation. To enable the supplier site, the Create Debit Memo from RTS transaction option needs to be selected in the Supplier Sites window in Oracle Purchasing . If the flag is enabled, every time the Oracle iProcurement requester creates a return transaction against that supplier site, a debit memo will be created against the supplier invoice (if the supplier invoice exists).

Profile Options

The profile option POR: Enable Automatic Debit Memo Creation for Returns must be evaluated when implementing this feature. See Set Profile Options, page 2-38 for complete profile setup instructions.

Function Security

Excluding the Return Items function prevents requesters from creating returns against all receipts. Excluding the Return All Items function prevents requesters from creating returns against items they did not request. See Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

No additional considerations.

Corrections

There are occasions when requesters want to make modifications to an existing receipt quantity. Normally this is the result of human error when the wrong receipt quantity was originally entered. From the **Receiving** home page, requesters can select "Correct Items" and proceed to correct an existing receipt. It is also possible to correct the quantity of items that someone else has received.

Setup Steps

None

Profile Options

None

Function Security

Excluding the Correct Receipts function prevents a requester from creating corrections against any receipts. Excluding the Correct All Receipt function prevents a requester from creating corrections against receipts for any requisition lines on which they are not the original requester. See Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

No additional considerations.

Viewing Receipts

This feature enables requesters to view all the relevant receiving transactions for their requisitions as well as receipts processed by someone else.

Setup Steps

None

Profile Options

None

Function Security

Access to the Receiving History functionality can be restricted by excluding the function View Receipts. Access to the viewing receipts created by others can be disabled by excluding the function View All Receipts. See Set Up Function, Menu, and Data Security, page 2- 8 .

Workflow

None

Implementation Considerations

No additional considerations.

"Confirm Receipt" Notifications

It is possible to have notifications sent to the requester in order for them to respond to the receipt status of an order. These notifications are called confirm receipt notifications. The options available to the requester who receives a notification are *Fully Received*, *Not Received*, *Partially/Over Received* and *Reassign*. The line on the order must be set to a matching level of either 3-Way or 4-Way Matching. Some amount of time must have lapsed from the need-by-date found on the order line. (The standard amount of time is 1 day after the need-by-date, although this can be modified in the workflow). The process Confirm Receipts Workflow Select Orders must be submitted in order for the notifications to be sent to the requesters

Setup Steps

1. Set the profile options listed below.
2. Run Confirm Receipts Notification workflow.

Profile Options

The following profiles must be evaluated when implementing this feature:

- POR: Select Internal Requisition for Confirm Receipt
- POR: Select Inventory Replenishment Lines for Confirm Receipts

Function Security

None

Workflow

The workflow is called Confirm Receipts workflow. Its system name is PORCPTWF. See the Confirm Receipts section in *Customize Workflows*, page 2-22.

Implementation Considerations

- If the profile option POR: Select Internal Requisition for Confirm Receipt is set to *Yes*, internal requisition notifications will be sent to requesters in addition to standard requisition notifications.
- If the profile option POR: Select Inventory Replenishment Lines for Confirm Receipts is set to *Yes*, inventory destination lines in addition to expense destination lines will be sent as notifications to requesters.

Using a Spreadsheet to Load Catalog Data

This appendix explains how to create and load your catalog items into the Oracle iProcurement catalog using the spreadsheet loader.

This appendix covers the following topics:

- Introduction
- Introduction to the Catalog Structure
- Using a Spreadsheet to Load the Catalog Data
- Encoding Section
- Language Section
- Catalog Section
- Contract Reference Section
- Data Types
- Data Section
- Using the Bulk Loader with Extracted Items
- Reviewing and Saving Your Spreadsheet File
- Loading Your Spreadsheet File
- Resolving Errors
- Handling Special Characters
- Loading Images
- Translating Catalogs

Introduction

You can use any combination of spreadsheet text files and XML files to maintain your catalog items. You are not restricted to using one method or the other. For example, if you load your initial catalog data using XML, you can update the items using a spreadsheet text file.

This document is also available as a downloadable Readme file from the **Download Instructions and Templates** page in the eContent Manager (when you log in with the iProcurement Catalog Administration responsibility). For subsequent releases of Oracle iProcurement, always check the Readme file in the eContent Manager for the latest information.

Introduction to the Catalog Structure

At a high level, there are two areas that define the catalog—the catalog data and the catalog schema.

Catalog data consists of the items and services available for purchase. The associated prices for these items and services are also considered part of the catalog data.

Catalog schema is comprised of a combination of categories, local descriptors (sometimes known as category attributes) used to describe items in a specific category, and base descriptors (sometimes known as base attributes) used to describe any item or service in the catalog.

There are two types of categories in the catalog. Together, these categories define the hierarchy:

- Item categories, also known as genus categories, are used to group similar items. Item categories are found at the lowest level of the category hierarchy; therefore an item category can never be a parent category to a child category. Every item in the catalog must belong to an item category.
- Browsing categories, also known as navigation categories (or master or intermediate level categories), are used to define the levels of the category hierarchy. These types of categories can be either a parent or child to another category, but cannot contain any items.

Local descriptors apply only to items within a specific item category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Local descriptors can vary from one item category to another, and they are always optional.

Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. Some base descriptors, such as Supplier Item number, are required; others, such as Manufacturer, are optional.

Typically, catalog schema is loaded using a separate, XML file; however, there are some instances in which you may need to create both the schema and the item and price data in one file. There are two profile options that can be used to dictate whether you can include schema in your catalog spreadsheet file:

- *POR:Load Auto Category*. Setting this profile option to Yes ensures that if the loader encounters a category in the item section of the text file that does not exist in the catalog, it will create the category. Setting this profile option to No will cause the loader to reject the item belonging to this category (unless you use the Apply Category Mapping option on the **Specify Options** page when bulk loading, and category mapping already exists in Oracle e-Commerce Gateway). The default for this profile option is No. (In spreadsheet loading, if this profile option is set to Yes, the bulk loader creates both a name and key for your category; the key will be the same as the name.)

If you choose Yes for this profile option, you must map the new category to an internal category in Oracle Applications to successfully create requisitions for items in that category. See the online Help in the eContent Manager for more information on mapping.

Note: If mapping is successful after using the Apply Category Mapping option, the *POR: Load Auto Category* profile option is ignored.

- *POR:Load Auto Attrib*. Setting this profile option to Yes ensures that local descriptors referenced in the text file that do not exist in the catalog will be created. Setting this profile option to No will cause the loader to reject the item that references the local descriptors. The default for this profile option is No.

Using a Spreadsheet to Load the Catalog Data

Catalog content loaded into the catalog is divided into the following sections:

1. Encoding (optional): Used to define the character set that is used in the file.
2. Language (required): Used to identify the language in which the catalog data is loaded.
3. Catalog (required): Used to identify the catalog.
4. Contract Reference (optional): Used to associate a catalog with one or many contract purchase agreements established in Oracle Purchasing.
5. Data (required): Includes item information, price information, or both.

Opening the Spreadsheet Text File

After you extract the spreadsheet text file template from the Zip file, follow these steps to open it:

1. To open the text template, start your spreadsheet software (for example, Microsoft Excel).
2. From your spreadsheet software, open the text template.

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

3. Most spreadsheet software applications will ask you for the data type of the file. Select Delimited. You will then be asked to set delimiters for your data. Choose Tab. Do not change the tab appearance in the file.

Spreadsheet Tips

Use the following spreadsheet tips:

- On your spreadsheet template, leave the fields directly below the Language Section, #ENCODING, Catalog Section, Contract Reference, Item Section, Price Section, and Item Price Section fields blank. (The sections you see vary depending on which template you downloaded.) These sections are headers, not fields into which data must be entered. Also leave a blank row between these sections, to avoid format errors.
- Required descriptors are marked with an asterisk (*) in the spreadsheet text file.
- The maximum sizes mentioned later may be limited by your spreadsheet application. For example, Long Description allows up to 2,000 bytes, but your spreadsheet application may not allow this many characters in a column. If the maximum number of characters is limited by your spreadsheet application, open the .txt file in a text editor after you have completed your edits in the spreadsheet. Edit the file in the text editor to add more characters.
- Based on the default column formats, your spreadsheet program may have automatically applied some conversions to your data. For example, in some spreadsheet programs, leading or trailing zeros may be stripped. You should not

change the format of the columns to fix the data. (For example, in Microsoft Excel, when you select a column and choose Cells ... from the Format menu, the Category will be set to General.) Instead, always check your finished file in a text editor. Fix any problems in the text editor, if needed. (Alternatively, if you are using Microsoft Excel, you can enter a single quotation mark (') in the spreadsheet field before the data to enforce a number or date format. Then save the file.)

Encoding Section

If you are loading any special characters (such as é) in your spreadsheet file, and you are not using a UTF-8 editor, you must specify the proper character or multibyte encoding value, as shown in either of the following examples, to inform the spreadsheet loader of the encoding:

```
#ENCODING Cp1252
```

Or:

```
#ENCODING Unicode
```

Other language characters, such as Chinese, may require a different encoding value. Specify the encoding using the Internet Assigned Numbers Authority (IANA) registered character set names. A list of registered character sets is available from IANA at the following URL: <http://www.iana.org/assignments/character-sets>.

The encoding must support the format in which the file is saved. For example, if you specify Cp1252, the spreadsheet or text editor you are using must also support Cp1252 characters. The bulk loader uses the encoding to "read" the contents of the file. If this encoding does not support the characters in the file nor matches the encoding in which the file was saved, the system produces an error and rejects the file with a Failed status.

If you do not specify encoding in your spreadsheet file, UTF-8 is assumed, and the first line of the spreadsheet file should be the Language Section. You may omit the encoding if you are not using special characters in the file, or if you used a UTF-8 editor to edit the file.

When you download the spreadsheet template file, an encoding defaults. This default encoding comes from the profile option FND: NATIVE CLIENT ENCODING. For example, if this profile option is set to WE8MSWIN1252, the encoding in the spreadsheet is Cp1252. (WE8MSWIN1252 is the technical name for the Cp1252 encoding. When you set the profile option, you select from a list of values.)

If the FND: NATIVE CLIENT ENCODING profile option is not set, the encoding in the downloaded template defaults based on the language of Oracle iProcurement you are using (also called the session language). For example, in an American English session language, the encoding is Cp1252. Generally, you should download the template in the same language in which you will bulk load it, so that the Encoding code and spreadsheet column names match the bulk load language. If, however, you need to bulk load the template in a different language than which you downloaded it, first make sure the column headings in your bulk load file match the template headings in that language. Then make sure the encoding is correct as described in the table in the next section and, if not, update it.

Note: If the default encoding does not match the session language, you will need to either change the encoding or change the column

headings. (The encoding defaults from the FND: NATIVE CLIENT ENCODING profile option, if set, but the column headings are always displayed in the session language.)

Note: The FND: NATIVE CLIENT ENCODING profile option and the Client Character Encoding field on the **Preferences** page are the same. Changing one changes the other, at the user level.

For a list of the valid encodings by language, see the table in the next section.

Language Section

The spreadsheet files that you submit must conform to the Langcode(-Subcode) standard.

The Langcode must be a two-letter language code as defined by ISO 639, Codes for the representation of the names of languages. The Subcode must be a country code from ISO 3166, Codes for the representation of names of countries. (See the list of language and territory codes in the table below.)

For example, the following illustrates setting the language to English and the country to the United States:

Language Section* EN-US

The language you specify must be installed in the Oracle iProcurement database. For more information on providing translations for catalog content, see: *Translating Catalogs*, page A-35.

The Oracle iProcurement catalog supports the following language code and territory code combinations, if the corresponding language is installed:

Valid Encoding, Language, and Territory Codes

Encoding	Language	Language Code	Territory Code
Cp1252	American English	EN	US
Cp1256	Arabic	AR	AE
Cp1252	Brazilian Portuguese	PT	BR
Cp1252	British English	EN	GB
Cp1251	Bulgarian	BG	BG
Cp1252	Canadian French	FR	CA
Cp1252	Catalan	CA	CT
Cp1250	Croatian	HR	YU
Cp1250	Czech	CZ	CZ
Cp1252	Danish	DA	DK

Encoding	Language	Language Code	Territory Code
Cp1252	Dutch	NL	NL
Cp1256	Egyptian	EG	EG
Cp1252	Finnish	FI	FI
Cp1252	French	FR	FR
Cp1252	German	DE	DE
Cp1253	Greek	EL	GR
Cp1255	Hebrew	IW	IL
Cp1250	Hungarian	HU	HU
Cp1252	Icelandic	IS	IS
Cp1252	Italian	IT	IT
MS932	Japanese	JA	JP
MS949	Korean	KO	KR
Cp1252	Latin American Spanish	ES	MX
Cp921	Lithuanian	LT	LT
Cp1252	Norwegian	NO	NO
Cp1250	Polish	PL	PL
Cp1252	Portuguese	PT	PT
Cp1250	Romanian	RO	RO
Cp1251	Russian	RU	SU
MS936	Simplified Chinese	ZH	CN
Cp1250	Slovak	SK	SI
Cp1250	Slovenian	SL	SI
Cp1252	Spanish	ES	ES
Cp1252	Swedish	SV	SE
MS874	Thai	TH	TH
MS950	Traditional Chinese	ZH	TW
Cp1254	Turkish	TR	TR

Catalog Section

This section is required and is used to identify the catalog.

Required and Validated Catalog Information

The following table describes the required catalog section fields:

Catalog Section Fields

Field Name (Required?)	Required?	Default Value	Description and Validation
Supplier	Required	(No default)	The supplier name specified here must match the corresponding supplier name defined in Oracle Applications, including using the same case. The limit is 240 bytes. *
Title	Optional	(No default)	Name used to identify your file, for your own purposes. There is currently no validation performed on this value. The limit is 255 bytes.

* If you're not sure of the supplier name, you can change it later by selecting it from an Oracle Applications list of suppliers on the **Specify Options** page just before you bulk load the file. See: Loading Your Spreadsheet File, page A-29.

Example 1: Sample Catalog Section

The following example shows a sample catalog section in the spreadsheet template:

Sample Catalog Section

#ENCODING	Cp1252	
Language Section*	EN-US	
Catalog Section	Supplier*	Title
	Acme	Acme Catalog

Contract Reference Section

This section is optional and is used to associate a catalog file with one or more contract purchase agreements or global contract agreements established in Oracle Purchasing.

Required and Validated Contract Information

The following table describes the required contract section fields; both fields are required if you want to specify a contract:

Contract Section Fields

Field Name (Required?)	Required?	Default Value	Description and Validation
Operating Unit	Required	(No default)	This is the operating unit defined in Oracle Applications in which the contract purchase agreement exists or in which the global contract agreement is enabled. If you are not using a multiple organizations setup (you have no operating units), enter All.
Contract Number	Required	(No default)	This is the contract purchase agreement or global contract agreement defined in Oracle Purchasing. The contract must be valid (approved, but not expired) for the specified operating unit. (That is, it must be created or enabled in the specified operating unit.) In addition, the contract must be established for the same supplier and currency as all items and all other contracts within the catalog file. You cannot specify more than one contract per operating unit in the same file.

For information on contract purchase agreements, including how to enable global contract agreements in an operating unit, see the *Oracle Purchasing User's Guide*.

Example 2: Sample Contract Reference Section

The following example shows a sample contract reference section in the spreadsheet template:

Sample Contract Reference Section

#ENCODING	Cp1252	
Language Section*	EN-US	
Catalog Section	Supplier*	Title
	Acme	Acme Catalog
Contract Reference	Operating Unit	Contract Number
	Vision Operations	1357
	Vision Services	9984

Contract Numbers and Operating Units

The Contract Reference section dictates the following:

- For any item in the file that has my same Operating Unit, use this Contract Number.
- For any item in the file does not have my same Operating Unit, do not use this Contract Number. (Ignore the Contract Number for that item.)
- One exception exists to the above rules. For any item or price line in the file that has a blank (or All-Buyers) Operating Unit, the bulk loader loads two lines if a Contract Number is also specified. One line specifies the item at the general price associated with the blank (or All-Buyers) Operating Unit. The other line specifies the item at that price, but associates it with the Operating Unit and Contract Number specified in the Contract Reference section.

If more than one global contract agreement number is found in the enabled operating unit, then the most recently created global contract agreement is used. (For example, global contract agreement 123 was created in Operating Unit 1 and enabled in Operating Unit A. Another global contract agreement with that same number was created in Operating Unit 2 and enabled in Operating Unit A. If you specify contract number 123 and Operating Unit A in the Contract Reference section, then the bulk loader chooses the most recently created contract.)

Data Types

Each descriptor comes with a data type. When you specify the item and price information in your file, be sure to use the correct data type for the descriptors. For example, Lead Time is a Number data type. If you enter the text four instead of the number 4 for Lead Time, the system gives you an error.

The data types are listed below.

Text

Values for this descriptor must be text or numbers only. The values cannot be translated; they will always display the same in all languages.

Translatable Text

Values for this descriptor (text or numbers) can be translated; the catalog allows you to display different values for this descriptor in different languages. See: Translating Catalogs, page A-35.

Number

Values for this descriptor must be a number only. The values can contain decimals (such as .86). Except for price and lead time, the numbers can be negative.

Data Section

The data section of your spreadsheet file may contain any one of the following headings:

- **Item Price Section:** Used to create and maintain items and their respective prices. This heading is used in the ItemPrice.txt template file.
- **Item Section:** Used to maintain existing item information in the catalog. This heading is used in the Item.txt template file.
- **Price Section:** Used to maintain price information only. This heading is used in the Price.txt template file.

The first time items are added to the catalog, you must use the Item Price Section in the ItemPrice.txt file. This ensures that a price is associated with the item. Any subsequent item or price modifications may be performed through the Item Price (ItemPrice.txt file), Item (Item.txt template), or Price (Price.txt file) sections depending on the type of information that is being updated.

Note: If you delete an item using the Item.txt, ItemPrice.txt, or Category.txt templates, specifying only the minimally required information, all associated pricing is automatically removed, for the specified operating unit. (Items and prices in other operating units are not deleted.) The item is also deleted in all languages. If you want to delete only a price line, not an item, use the Price.txt template.

Adding, Updating, and Deleting

Items and prices may be maintained using the action commands: ADD, UPDATE, SYNC, DELETE.

Action commands ADD and UPDATE are internally converted to SYNC. SYNC adds an item or price if it is new and updates it if it already exists.

Item Uniqueness

If the following item information in the Item.txt or ItemPrice.txt file is the same as an existing item in the catalog, SYNC updates the item; otherwise, SYNC adds the item to the catalog as a new item:

- Supplier
- Supplier Item
- Operating Unit
- Supplier Part Auxiliary ID

Note: The item uniqueness criteria applies only when using the Item.txt, Category.txt, or ItemPrice.txt templates.

For example, if two items have the same supplier, supplier item number, and operating unit, but different supplier part auxiliary ID numbers, these will be separate items in the catalog:

Supplier	Supplier Item Number	Operating Unit	Supplier Part Auxiliary ID	Description
Acme	3255156	(none specified)	Green	Green T-shirt
Acme	3255156	(none specified)	Red	Red T-shirt

Note: Because the items in the example above are unique, they are treated as separate items. Notice that their descriptions differ. Any other descriptor that does not uniquely identify the item, such as Lead Time, can likewise differ between the two items. Similarly, to update this item, you need to provide two lines in the file, one to update the information (such as Lead Time) for the Green item and one to update the Red.

Price Uniqueness

If the following price list line information (a row in the spreadsheet) in the Price.txt file is the same as an existing price list line in the catalog, SYNC updates the pricing information; otherwise, SYNC adds the new pricing to the catalog:

- Supplier
- Supplier Site
- Supplier Item
- Supplier Part Auxiliary ID
- Operating Unit
- Currency

Note: The price uniqueness criteria applies only when using the Price.txt template.

For example, the following three items can coexist in the catalog because they do not all have the same supplier part auxiliary or supplier site:

Supplier	Supplier Item Number	Operating Unit	Supplier Part Auxiliary ID	Currency	Supplier Site
Acme	123456	Vision Operations	01	USD	San Jose
Acme	123456	Vision Operations	02	USD	San Jose
Acme	123456	Vision Operations	02	USD	Boston

Note: Because the price lines in the example above are unique, they are treated as separate price lines in the Price.txt template. For example, specify the line with the Boston site to update or delete only that line. Price.txt deletes only the line with the matching site. (Even if you leave the site blank, Price.txt looks for the line with no site.) Item.txt and ItemPrice.txt, however, do not use the site to uniquely identify the item. In these templates, regardless of the site specified, the bulk loader deletes all items whose item uniqueness criteria match. In the example above, if you specified the line with the Boston site in the Item.txt or ItemPrice.txt templates, the bulk loader would delete all three lines.

Further Notes

If you specify the same item, with the same uniqueness criteria as described above, more than once in the same file, the system processes the last identical entry and rejects the previous ones. For example, you specify a supplier of Acme, a supplier item number of 123456, an operating unit of Vision Operations, a supplier part auxiliary ID of Green, and a description of *Green industrial tool box*. Later in the same file, you specify this same data, except that the description is *Green and gold industrial tool box*. This item is loaded with a description of *Green and gold industrial tool box*.

Items on requesters' favorites list are updated by the bulk loader.

Required and Validated Item and Price Information

The following table describes all of the base descriptors you may see in the template. Some of these fields do not appear in all templates. For example, pricing fields will not appear in the Item.txt template, because the Item.txt template includes only item information. If you downloaded the Category.txt template, additional fields may appear representing the local descriptors for the category you chose.

Note: The maximum byte lengths given below are not necessarily the same as character lengths. For example, 700 Japanese characters will typically be longer than 700 bytes, and a special symbol (though it is a single character), may be more than one byte. Therefore, the actual, byte limits are given below. How these translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

Data Section Fields

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Category (No key)	Required	(No default)	Unless <i>POR:Load Auto Category</i> is set to Yes, the category must be defined in Oracle iProcurement (or mapped to an internal category in Oracle e-Commerce Gateway). *	— 250
Action (No key)	Required	The action from the preceding row, or SYNC	Indicates whether the information in the file should be added, updated, or deleted in the catalog. Valid options are ADD, UPDATE, SYNC, DELETE.	— —
Supplier Item SUPPLIER_ PART_NUM	Required	(No default)	Supplier item number. (If using the Price.txt template, the item must already exist in the catalog.)	Text 25

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Supplier Part Auxiliary ID SUPPLIER_ PART_AUXID	Optional	(No default)	Alternative part number or identifier for the item. For example, you could use this field to show that an item with the same Supplier and Supplier Item number can be purchased in two different units of measure (UOMs). Requesters would see the item (with the same Supplier Item number) twice, but with different UOMs in the Supplier Part Auxiliary ID field.	Text 255
Description DESCRIPTION	Required when adding the item	(No default)	Description of the item or service.	Translatable Text 240
UNSPSC Code UNSPSC	Optional	(No default)	The United Nations Standard Product and Service Code is an open, nonproprietary system of codes and standardized descriptions for classifying goods and services. To view a list of the UNSPSC codes, go to http://www.eccma.org . (This information does not appear on the requisition, nor is it validated against existing UNSPSC codes.)	Text 700

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Pricelist PRICELIST	Optional	All-Buyers List Prices <i>or</i> <Operating Unit> Price List	One price list is allowed for each combination of supplier, operating unit, and currency. If no operating unit or price list is specified, the bulk loader defaults All- Buyers List Prices for the price list name. If an operating unit is specified, the bulk loader defaults the operating unit name followed by Price List—for example Vision Services Price List.	Text 90
Operating Unit BUYER	Required when a Supplier Site is specified	All-Buyers	Operating unit defined in Oracle Applications. If an operating unit is not specified here, this item is applicable to all operating units (All-Buyers). If <i>POR: Bulk Load for All Business Groups</i> is set to No, you can enter only an operating unit within your business group. (If it is set to Yes, you can enter any operating unit.) **	Text 700

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Supplier Site SUPPLIER_SITE	Optional	(No default)	<p>The supplier site must meet the following criteria:</p> <p>Match the site name defined for that supplier in Oracle Applications. **</p> <p>Be enabled for the specified Operating Unit. If the Operating Unit is blank or All-Buyers, the Supplier Site must be blank.</p> <p>Be designated a Purchasing site in Oracle Applications.</p> <p>If associated with an Inactive On date, the date must be later than today.</p> <p>If a Contract Number was specified, the Supplier Site is ignored. Instead, the Supplier Site on the contract purchase agreement is used. For global contract agreements, the applicable Purchasing Site specified on the agreement is used.</p>	Text 100
Unit UOM	Required if Unit Price is specified	(No default)	Must be a valid unit of measure code defined in Oracle Applications.	Text 30

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Unit Price PRICE	Required, except in Item.txt	(No default)	Must be a number greater than or equal to 0, such as 10, 1.99, or 2,000. Must not use any special formatting, such as currency symbols. The bulk loader uses the language code in the file to interpret the decimal separator in the number. If the decimal separator is not valid for the specified language, then the bulk loader rejects the price line. See: Translating Catalogs, page A-35.	Number —
Currency CURRENCY	Required if Unit Price is specified	(No default)	Must be a valid currency code established in Oracle Applications. You cannot update a price list's currency once you create it; however, you can create more than one price list per operating unit, each with a different currency. See the information on price lists, following this table.	Text 4

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Manufacturer MANUFACTURER	Optional	(No default)	Name of the manufacturer of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.)	Translatable Text 240
Manufacturer Item MANUFACTURER_ PART_NUM	Optional	(No default)	Manufacturer-assigned part number of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.)	Text 30
Alias ALIAS	Optional	(No default)	Alternate description or identifier for each item or service that people can enter when performing a search. For example, an alias for <i>soda</i> might be <i>pop</i> . To enter more than one alias, separate each alias with a comma—for example: <i>soda, pop, cola</i> . (This information does not appear on the requisition.)	Translatable Text 700

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Lead Time LEAD_TIME	Optional	(No default)	Amount of time, expressed in days, between the order date and the shipment date. Use any number greater than or equal to 0, such as 7 or 1.5. <i>Seven</i> is invalid. (This information does not appear on the requisition.)	Number —
Image PICTURE	Optional	(No default)	File name of the image that is associated with the item; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i> . Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif. (This information does not appear on the requisition.) See: Loading Images, page A-33.	Text 700

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Image URL PICTURE_URL	Optional	(No default)	No longer used. If, however, you used this descriptor in previous releases, you may still use it to provide an image URL. Note that if both Image and Image URL are specified, Image URL is ignored.	Text 150
Thumbnail Image THUMBNAIL_ IMAGE	Optional	(No default)	File name of a smaller, thumbnail image for the item, for displaying on the Search Results Summary, Search Results, and Compare Items pages; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i> . Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif. (This information does not appear on the requisition.) See: Loading Images, page A-33.	Text 700

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Attachment URL ATTACHMENT_ URL	Optional	(No default)	URL at which an attachment for each item or service can be viewed. Include the full URL; for example: http://www.us.oracle.com/attachment.gif. On the Item Details page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details) 700
Supplier URL SUPPLIER_URL	Optional	(No default)	URL for the supplier's Web site. Include the full URL; for example: http://www.us.oracle.com. On the Item Details page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details) 700
Manufacturer URL MANUFACTURER_ URL	Optional	(No default)	URL for the manufacturer's Web site. Include the full URL; for example: http://www.us.oracle.com. On the Item Details page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)	Text (but displayed as a URL in search results and item details) 700

Field Name Key	Required?	Default	Description and Validation	Data Type and Size (in Bytes)
Item Type ITEM_TYPE	Optional	(No default)	Indicator of whether the item is a PRODUCT or SERVICE (use capital letters). Note: The ITEM_TYPE is for informational purposes only. There is no relationship between this value and line types specified in Oracle Applications.	Text —
Long Description LONG_DESCRIPTION	Optional	(No default)	Detailed description of your item or service. (This information does not appear on the requisition.)	Translatable Text 2000

* If the category exists in the catalog already, you can enter either the name or key here. (In XML bulk loading, you specify both a name, such as Cookies, and a key, such as COOKIES_UNSPSC_CODE, to identify a category.)

** If you're not sure of the exact name, you can change it later by selecting it from an Oracle Applications list of valid names on the **Specify Options** page just before you bulk load the file. See: Loading Your Spreadsheet File, page A-29.

Price Lists

For a given operating unit, supplier, and currency, there can be only one price list; however, you can create more than one price list per operating unit if the currencies are different.

For example, the following price lists can coexist because, in the first two price lists, the currencies are different and in the last price list, the operating unit is different:

Coexisting Price Lists

Price List Name	Operating Unit	Supplier	Currency
2003 Prices	Vision Services	Oracle	USD
2003 Prices	Vision Services	Oracle	GBP
2003 Prices	Vision Operations	Oracle	USD

The following price lists cannot coexist because the names are different; when uploading the price list 2003 Prices - Revised, Oracle iProcurement detects that a price list already exists for that operating unit, supplier, and currency, and it will not accept a new one:

Price Lists that Cannot Coexist

Price List Name	Operating Unit	Supplier	Currency
2003 Prices	Vision Services	Oracle	USD
2003 Prices - Revised	Vision Services	Oracle	USD

Example 3: Items and Prices (ItemPrice.txt)

In this ItemPrice.txt spreadsheet example, two items for the supplier Acme are added to the catalog. Because no Pricelist and Operating Unit are given, the item is visible to all operating units. An item that is visible to all operating units is said to have a general (or list) price.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Items and Prices (ItemPrice.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123	Gold Ski			EA	350	USD
	Sports	SYNC	SKI-234	Silver Ski			EA	350	USD

Example 4: Operating Unit-Specific Items (ItemPrice.txt)

This example shows how to create operating unit-specific items and prices. In this example, the items cost 350 USD for all operating units except for Vision Operations, where they cost 324.19 EUR.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Operating Unit-Specific Items (ItemPrice.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123	Gold Ski			EA	350	USD
	Sports	SYNC	SKI-234	Silver Ski			EA	350	USD
	Sports	SYNC	SKI-123	Gold Ski	Vision Prices	Vision Operations	EA	324.19	EUR
	Sports	SYNC	SKI-234	Silver Ski	Vision Prices	Vision Operations	EA	324.19	EUR

Example 5: Operating Unit-Specific Prices (Price.txt)

In this example, a new Price.txt file is created to update prices for the operating unit-specific items created in Example 4 above. The operating unit is Vision Operations, and the prices are updated only for requesters in that operating unit. In addition, a new price is added for requesters in Vision Operations; the price applies only to items coming from the Bonn site.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Operating Unit-Specific Prices (Price.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Pricelist	Operating Unit	Supplier Site	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123				EA	350	USD
	Sports	SYNC	SKI-234				EA	350	USD
	Sports	SYNC	SKI-234	Vision Prices	Vision Operations	BONN	EA	280	EUR

Note: This example assumes the items were already added to the Vision Operations operating unit using the ItemPrice.txt template. Use Price.txt

only to update the prices of items that already exist (that were created using ItemPrice.txt). Otherwise, the items will be rejected.

Example 6: Item Updates (ItemPrice.txt)

This example updates the description of SKI-123. Using both this and the previous examples, this item is updated in all operating units except Vision Operations (since no operating unit is specified). To update the item in Vision Operations, you would need to create a second SKI-123 row in the example, identical to the previous row, but specifying Vision Operations as the operating unit.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Item Updates (ItemPrice.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	SYNC	SKI-123	Triple Gold Ski			EA	350	USD

Note: You could also have used Item.txt to make this update.

Example 7: Item with Supplier Part Auxiliary ID (ItemPrice.txt)

This example specifies a Supplier Part Auxiliary ID for SKI-123. Since Supplier Part Auxiliary ID is used to uniquely identify an item (along with Supplier, Supplier Item, and Operating Unit), the bulk loader does not update SKI-123 with the Supplier Part Auxiliary ID. Instead, the bulk loader creates a new item: the existing item SKI-123, with no Supplier Part Auxiliary ID, stays in the catalog; SKI-123, with a Supplier Part Auxiliary ID of Green, is now an additional item in the catalog.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Item with Supplier Part Auxiliary ID (ItemPrice.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Supplier Part Auxiliary ID	Description*	Unit*	Unit Price*	Currency*	
	Sports	SYNC	SKI-123	Green	Triple Gold Ski	EA	350	USD	

Example 8: Item Deletion (ItemPrice.txt)

This example deletes SKI-234. Using both this and the previous examples, this item is deleted in all operating units except Vision Operations (since no operating unit is specified). To delete the item in Vision Operations, you would need to create a second SKI-234 row in the example, identical to the previous row, but specifying Vision Operations as the operating unit.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Item Deletion (ItemPrice.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Description*	Pricelist	Operating Unit	Unit*	Unit Price*	Currency*
	Sports	DELETE	SKI-234	Silver Ski			EA	350	USD

Note: You could also have used Item.txt to delete this item. Using Item.txt or ItemPrice.txt to delete an item deletes all its associated pricing, in the specified Operating Unit. For example, if the item has

multiple prices in a single operating unit, which vary by currency or supplier site, then deleting this item using Item.txt or ItemPrice.txt also deletes its multiple prices. Items and prices in other operating units are not deleted.

Example 9: Price Deletion (Price.txt)

In this example, the operating unit-specific price for SKI-234 is deleted. Only the Vision Operations price for the Bonn site is deleted, not the item and not the other list prices or operating unit-specific prices for the item.

Note: This example does not show all of the columns you would see in an actual template. It does show all required columns, plus any other columns specific to the example.

Price Deletion (Price.txt)

#ENCODING	Cp1252								
Language Section*	EN-US								
Catalog Section	Supplier*	Title							
	Acme	Acme Catalog							
Contract Reference	Operating Unit	Contract Number							
Item Price Section	Category*	Action*	Supplier Item*	Pricelist	Operating Unit	Supplier Site	Unit*	Unit Price*	Currency*
	Sports	DELETE	SKI-234	Vision Prices	Vision Operations	BONN	EA	280	EUR

Case Sensitivity

All values are case sensitive except the following values:

- Category, such as Ball Point Pens
- Descriptor, such as Ink Color or Lead Time
- Unit, such as EA
- Supplier Site

For example, you can specify the category as Ball Point Pens or Ball point pens, and they would be treated as the same. Your item would be added to the category Ball Point Pens. But the supplier item number AB457Z would be treated as a different item number than ab457z. The system would add ab457z to the catalog if AB457Z already exists.

Blanking Out a Descriptor

If you want to delete the value for a particular descriptor for an item, use the text #DEL, as shown in the following example. You cannot delete values for required descriptors or for the Supplier Part Auxiliary ID. (To delete the Supplier Part Auxiliary ID for an item, you would need to delete the item and recreate it without the Supplier Part Auxiliary ID.)

Example 10: Deleting Information

The following example shows a sample spreadsheet template that uses #DEL to delete a value that describes an item:

Deleting Information

#ENCODING	Cp1252					
Language Section*	EN-US					
Catalog Section	Supplier*	Title				
	Acme	Acme Catalog				
Item Price Section	Category*	Action*	Supplier Item*	Description*	UNSPSC Code	Long Description
	Ball Point Pens	SYNC	1896225	Black ball point pen, Medium point, Extra wide barrel		#DEL

In this example, item 1896225 no longer has a value for Long Description in the catalog. The Long Description descriptor itself still displays, but for your item, no value exists for Long Description.

Reclassifying an Item Under Another Category

If you want to move items formerly under one category, such as Ball Point Pens, to another category, such as Felt Pens, list all of the items under Felt Pens using the SYNC action. (You cannot have the same item in more than one category.)

Note: When you move an item from one category to another, you lose the local descriptors. For example, you originally add an item under the category Felt Pens, using Tip Width and Ink Color as local descriptors. You then move the item to Ball Point Pens. The item will no longer display the Tip Width and Ink Color you specified, even if Ink Color exists in the new category. Local descriptors are specific to each category.

Using the Bulk Loader with Extracted Items

You can use the bulk loader to update any extracted item that has a supplier and supplier part number associated with it. For example, the extractor does not include manufacturer information with the items; however, you could use the bulk loader to specify a manufacturer for an extracted item.

Recall the rules discussed in the section earlier about adding, updating, and deleting. These rules determine whether you are updating an item or creating a new item. For example, if you provide a supplier part auxiliary ID for an extracted item, the bulk loader creates a new item.

Note: In general, you should extract an item first, then bulk load updates to it if desired. If you bulk load the item first, then extract it, the item may not be updated, but may be created as a new item.

You cannot update the category of extracted items. For extracted items, you can use the bulk loader to change only the following descriptors (in addition to any new descriptors you may have added to the catalog):

- Manufacturer
- Manufacturer Item number
- Description
- Long Description
- Alias
- Attachment URL
- UNSPSC Code
- Availability
- Lead Time
- Item Type
- Image Thumbnail Image
- Supplier URL
- Manufacturer URL

Using the bulk loader, you cannot delete items that were extracted from Oracle Purchasing. To delete items that are considered extracted, delete them in Oracle Applications, then rerun the item extractor.

Reviewing and Saving Your Spreadsheet File

See the tables in the previous sections that describe the information in the template to be sure that the information in your spreadsheet file will validate successfully.

Save your file as a tab-delimited text file with a .txt extension. You can give the file any name. (If you did not provide a Title for your file, the bulk loader stores the file name in the system.)

The bulk loader has no file size limitations; however, larger files may take some time to load.

Loading Your Spreadsheet File

Once you have created and reviewed your spreadsheet file, load it to Oracle iProcurement.

Loading the File

Follow these steps to load the file:

1. Use the iProcurement Catalog Administration responsibility to access the eContent Manager home page.

2. Expand "Load Data & Schema" and click "Manage Loading" to open the **Loader Jobs** page.
3. On the **Loader Jobs** page, click Upload Items.
4. Enter the File Name and path, or click Browse to navigate to your spreadsheet (.txt) file.
5. For File Type, select Tab-delimited text.
6. Click Continue.
7. If you would like to replace certain values, such as Supplier and Supplier Site, for all items in your catalog file, then specify the following optional fields:

- Select a Supplier if you wish to replace the Supplier specified in the file.
- Select an Operating Unit for which all items in the file are applicable. If *POR: Bulk Load for All Business Groups* is set to No, then you can select only operating units that are in your business group.

This Operating Unit replaces the line-level operating units specified in the file. It does not replace the operating unit in the Contract Reference section of the file, if specified. (The operating unit that you select here does affect the Contract Reference section, however. A contract specified in the Contract Reference section is applied only to those lines whose operating units match its own. See the information on contract numbers and operating units in Contract Reference Section, page A-7 .

- Select a Supplier Site* to load these items for a particular Supplier Site. Oracle iProcurement displays only the list of sites valid for the selected operating unit and supplier. If global contract agreements exist in Oracle Purchasing, then the list additionally includes purchasing supplier sites that are associated with the operating units in which the contract is enabled.
- You may optionally select a Contract Purchase Agreement* that is applicable to all items in the file. (If you already specified one or more agreements in the file, then the agreement you select here replaces those.)

Oracle iProcurement retrieves this list of valid agreements from Oracle Purchasing, for the Operating Unit and Supplier you chose. The list of contract purchase agreements from which you can choose consists of the following:

- Contract purchase agreements that were created in the selected Operating Unit (known as the *owning organization*) and that are valid for the selected Supplier Site, if a site was selected.
- Global contract purchase agreements that were enabled in the selected Operating Unit and whose purchase sites match the selected Supplier Site, if a site was selected. (The enabled operating unit is known as the *requesting organization*. Global contract agreements are associated with a *purchasing site*, which is the site with which the purchase order is ultimately created.)

For more information on global agreements, see the *Oracle Purchasing User's Guide*.

- Select Yes or No for Negotiated Prices. Use this field if you are or will be implementing Daily Business Intelligence (DBI) for Procurement. If you select Yes, then DBI for Procurement considers all items from this supplier to have

negotiated prices, for reporting purposes. For more information, see the *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

* This option is only available when you select an Operating Unit and Supplier.

8. Choose whether you want to apply category mapping to the file.

If you choose Yes, Oracle iProcurement checks whether category mapping is set up in Oracle e-Commerce Gateway. If a category in the bulk load file matches a category that is mapped in Oracle e-Commerce Gateway and that has been extracted to the catalog, the bulk loader adds the item to the mapped category. For more information and examples, see the online Help in the eContent Manager.

9. Click Upload to send your file.

As soon as the load is started, the screen displays a confirmation message and job number.

Checking the Job Status in the eContent Manager

To check the status of your job, return to the **Loader Jobs** page. The **Loader Jobs** page tells you the status of your entire job:

- Pending (waiting to be processed)
- Running (processing the file)
- Completed

If you included one or more contract references in your file which were successfully loaded, the bulk loader counts these as separate lines, in addition to successfully loaded item or price lines in the file.

- Failed (did not load the file at all because of a format or encoding error, or loaded the file but rejected some of its lines)

Note: If the entire file failed and you cannot determine why, use the Requests window in Oracle Applications as described below.

Large files may take some time to load. You do not need to remain logged in while your job completes. If you need, click the Refresh or Reload button on your browser to update the status.

Using the Requests Window to Check the Job Status

As an alternative to the **Loader Jobs** page, you can also view bulk load jobs in Oracle Applications:

1. In Oracle Applications, in the Oracle Purchasing or System Administration responsibilities, navigate to the View Requests window as follows:

From Oracle Purchasing: Requests

From System Administration: Requests > View

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

2. In the Find Requests window, choose to find all requests or enter a specific Request ID, Name, or other information.

The bulk load number assigned to your bulk load job in the eContent Manager is the same as the Request ID. The request name is Catalog Bulk Load - Items & Price Lists.

The Requests window uses different status readings for its jobs. For example, a bulk load file with a status of Failed on the **Loader Jobs** page has a status of Completed - Warning in the Requests window.

3. You may be able to see more details about the bulk load and errors using the View Log button.

If you still cannot determine the cause of an error using the log, temporarily set the profile option *POR: Set Debug Catalog Loader ON* to Yes with Detail and bulk load the file again. Setting this profile option to Yes or Yes with Detail displays a more detailed log of the bulk load process for that job. (This profile option should be set to Yes or Yes with Detail only while troubleshooting.)

Resolving Errors

The **Loader Jobs** page alerts you to failures or rejected lines in your spreadsheet file. Oracle iProcurement looks for errors in your file in two phases: format errors and validation errors.

Format errors (failures)

Format errors occur when the spreadsheet file fails validation. Some examples of format errors include special characters in your file that are not covered by the character set specified in the #ENCODING declaration, or extra rows or columns in your spreadsheet. If a format error is encountered, the load process stops, and a Failed status is returned.

If your job fails, fix the file and resubmit it for processing.

Validation errors (rejected lines)

Once format errors, if any, are resolved, Oracle iProcurement checks for validation errors. Validation errors occur when information that you entered in your spreadsheet file does not match corresponding information already held within Oracle iProcurement or Oracle Applications. For example, if you enter values for Unit or Currency that Oracle Applications does not recognize, a validation error will occur. The individual item or price for which the validation errors occurred will be rejected.

If your job contains rejected lines, click the Rejected Lines number for the job to view the errors. Fix the file and resubmit it for processing.

Handling Special Characters

If you want to include special characters (such as trademark symbols) in your text file, follow the steps below. You only need to follow these steps if the special characters are not supported by the encoding in which the file was saved. For example, a file created in Germany likely supports saving files with umlaut characters, and you do not have to follow these instructions for inserting umlaut characters. Follow these instructions if the encoding in which your file is saved does not support the special character. Trademark or copyright symbols are examples of these.

These steps are just one method for copying special characters into the bulk load file. You may have other methods.

To insert special characters in your spreadsheet text file:

1. Open your text file in your spreadsheet application.
2. Access the Character Map utility in Windows.

Depending on your computer's configuration, you may be able to find this utility in the Start menu: choose Program, then Accessories, then System Tools.

3. Select the proper encoding for the contents of the file. For example, if the contents of the file are in German, select the Windows Western encoding (Cp1252). See Encoding Section, page A-4.

You may find the encoding in a Subset drop-down menu or in an advanced view area of the Character Map window.

4. In the Characters to Copy field, double-click the special character from the characters display in the Character Map window.

You may need to select a font such as Times New Roman from the Font menu in the Character Map window.

5. Copy and paste the text or character from the Characters to Copy field to your file. (You can use the Copy button in the Character Map window and the Paste command in the spreadsheet application.)
6. Make sure the proper encoding is entered in the #ENCODING field in the spreadsheet text file, as usual, according to the language contents of the file. See Encoding Section, page A-4.

7. Save and upload your spreadsheet .txt file.

An alternative to using the Character Map utility is to use the "Alt" number key sequence for the special character. (Hold down the Alt key while entering the number sequence. You must use the number keypad on your keyboard to enter the numbers.) For example:

- Alt + 0153—Trademark ™
- Alt + 0174—Registered trademark ®
- Alt + 0169—Copyright ©
- Alt + 0196—A umlaut Â

These numbers are the decimal equivalents of a letter. For example, 065 is the decimal equivalent of A.

Note: Do not use HTML code or character sequences, or Java scripts, in the bulk load file. For security reasons, Oracle Applications Framework (the technology upon which Oracle iProcurement is built) ignores these. For example, Buy Now displays as Buy Now in the catalog. The sequence © (instead of the copyright symbol) displays as © in the catalog.

Loading Images

You can specify or load two kinds of images for items:

- Images that display on the **Item Details** page when requesters view the details of an item. (Use the Image field in the bulk load file.)

- Smaller, thumbnail versions of the images that display on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. (Use the Thumbnail Image in the bulk load file.)

For a complete overview of image management, including recommendations on thumbnail image sizes, see the Image Management section of the *Oracle iProcurement Implementation Guide*.

There are two ways to associate items with images in your bulk load file:

- Copy the images to the local server and indicate the image file names in the spreadsheet file.
- Reference the URLs of the images in the spreadsheet file.

To copy the images to the local server:

1. For the *POR: Hosted Images Directory* profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA_MEDIA directory.

Behind the scenes, the catalog uses the *Application Framework Agent* and *POR: Hosted Images Directory* profile options to locate the image. For example, if *Application Framework Agent* is set to `http://abc.com:8888` and *POR: Hosted Images Directory* is set to `/OA_MEDIA/US/`, then the catalog locates the image `abc.gif` at `http://abc.com:8888/OA_MEDIA/US/abc.gif`. (If you specify a full URL, such as `http://abc.com:8888/abc.gif`, in the bulk load file, then the catalog goes directly to that URL. The catalog constructs the URL based on the profile options described here only when a catalog image name, with no URL, is specified in the bulk load file.)

2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Use the appropriate columns in your spreadsheet file to specify the image file name, such as `bluepen.gif`.

To specify an image for the **Item Details** page, use the Image column. To specify a thumbnail image for the search results and comparison pages, use the Thumbnail Image field.

Note: The file name for the image is case sensitive. For example, if the image file name is `bluepen.gif`, but you specify `BluePen.gif` in the Image field, the image will not display.

4. Load your spreadsheet file.

To specify the URL of the image that resides on the Internet:

1. Obtain the full path of the image (for example, `http://www.oracle.com/toplogo2.gif`).
2. Insert this full path into the appropriate columns in your spreadsheet file.

To specify an image for the **Item Details** page, use the Image column. To specify a thumbnail image for the search results and comparison pages, use the Thumbnail Image field.

3. Load your spreadsheet file.

If you specify both a server image (in the Image field) and an Image URL for an item, Oracle iProcurement displays the server image.

Note: Instead of creating separate detail and thumbnail images, you could use the same image file name or URL for both the Image and Thumbnail Image fields. Then set either the *POR: Thumbnail Width* or *POR: Thumbnail Height* profile option to resize the image for thumbnails.

Translating Catalogs

You can load your catalog items in any or all of the languages that Oracle iProcurement supports. The language you specify in your file must be installed in the Oracle iProcurement database.

When you add an item to the catalog, it is added only in the language specified at the beginning of your spreadsheet file. To provide your catalog items in another language, translate the spreadsheet file and load it again specifying the supported language and the action command SYNC.

When you delete an item, specifying an action of DELETE, the item is deleted for all languages installed in the Oracle iProcurement database.

When an item is created in another language, only the translatable descriptors (those with a Translatable Text data type) need to be specified in the spreadsheet file (along with minimally required values). All of the non-translatable descriptors, such as Manufacturer Item number, are automatically inherited from the original language in which the item was created. If you change the value of a non-translatable descriptor when loading the translated file, the change will appear in all languages installed in the Oracle iProcurement database. Only translatable descriptors can vary by language. For example, if you change the Manufacturer Item number in one language, it is changed in all languages; however, if you change the item's Description, it is changed only in the language specified in the file.

Load your catalog items in one language at a time. For example, load your catalog items in English, using the EN-US language code, then translate and load that catalog file in French using the FR-FR language code.

The information that is needed to translate an item includes:

- Supplier (for validation purposes) - required
- Supplier Item (for validation purposes) - required
- Category (for validation purposes) - required
- Supplier Part Auxiliary ID (for validation purposes) - required if the item you are translating has a Supplier Part Auxiliary ID. The Supplier Part Auxiliary ID is used to uniquely identify an item.
- Description (for validation purposes and translation, if applicable) - required when adding an item for the first time to any language
- Descriptors whose TYPE=Translatable Text, if applicable - optional

Note: The column headings (descriptor names) in your spreadsheet must match exactly those given in the system for that language. To ensure that the column headings are valid for the language you are translating to, log on to Oracle iProcurement in that language and download the spreadsheet template file. The file will include

column headings in that language. Either copy your translated item information to this file, or overwrite the column headings in your existing file with the translated column headings (whichever is easier for you).

Pricing

Pricing does not need to be included in the translated file. When an item is translated to another language, its pricing is also automatically copied over to that language. You could use the Item.txt template to translate the item information and omit the pricing information.

As with all non-translatable descriptors, if you change the pricing information in one language, it is changed in all languages. For example, you bulk load an item that costs 2 USD, specifying EN-US (English) in the file. Later, you change EN-US to FR-FR (French) and change the price from 2 USD to 4 USD. The price is changed in all languages.

In another example, you publish an EN-US (English) file with USD prices for Operating Unit A; you then create a FR-FR (French) version of that catalog file, changing the pricing from USD to FRF, for Operating Unit A. In this example, Oracle iProcurement now has two price lists for Operating Unit A, one in USD and one in FRF, and the people in Operating Unit A see prices in those two currencies. If, however, you publish USD prices only for Operating Unit A and FRF prices only for Operating Unit B, then people in those operating units see only their prices. Price list currencies are independent of language.

The system uses the language code specified in your file to determine the decimal separator in a number. For example, if you specify American English (EN-US) in the file, the system interprets periods as decimal separators. If you specify German (DE-DE) in the file, the system interprets commas as decimal separators. The following table shows some examples:

Example Prices and Languages

Language in Bulk Load File	Price in Bulk Load File	Displayed Price when <i>ICX: Numeric characters</i> is 10,000.00	Displayed Price when <i>ICX: Numeric characters</i> is 10.000,00
EN-US	2,000	2,000.00	2.000,00
DE-DE	2,000	2.00	2,00
EN-US	10000.00	10,000.00	10.000,00
DE-DE	10000.00	1,000,000.00	1.000.000,00
EN-US	1.2,5	This price is rejected by the bulk loader, because EN-US does not expect a comma as a decimal separator.	This price is rejected by the bulk loader, because EN-US does not expect a comma as a decimal separator.
DE-DE	1.2,5	12.50	12,50
DE-DE	1,2.5	This price is rejected by the bulk loader, because DE-DE does not expect a period as a decimal separator.	This price is rejected by the bulk loader, because DE-DE does not expect a period as a decimal separator.
EN-US	1,29	129.00	129,00
DE-DE	1,29	1.29	1,29

Note: Decimal separators are influenced by the profile option *ICX: Numeric characters* in Oracle Applications. If this profile option is set to use periods as decimal separators, then the decimal separator that requesters see is a period regardless of their language. The bulk loader uses the language code in the file to determine *where* the decimal separator is placed. The profile option determines *how* the price displays to requesters. (If the profile option *ICX: Numeric characters* is not set, Oracle iProcurement uses the `nls_numeric_parameters` database setting to determine how to display the price.)

Using XML to Load Catalog Data

This appendix explains how to create and load your catalog items into the Oracle iProcurement catalog using the XML loader.

This appendix covers the following topics:

- Introduction
- Introduction to the Catalog Structure
- Using XML to Load the Catalog Data
- Version and Character Set Encoding
- Language Identification
- Administrative Section
- Data Types
- Root Descriptors Section
- Catalog Data Section
- Using the Bulk Loader with Extracted Items
- Reviewing and Saving Your XML File
- Loading Your XML File
- Resolving Errors
- Handling Special Characters
- Loading Images
- Translating Catalogs
- Backwards Compatibility

Introduction

The XML file that is used to load catalog information into Oracle iProcurement can be generated in a text editor, commercial XML generator program, or an XML generator program that you write yourself. You can use any combination of spreadsheet text files and XML files to maintain your catalog items. You are not restricted to using one method or the other. For example, if you load your initial catalog data using XML, you can update the item using a spreadsheet text file.

This document is also available as a downloadable Readme file from the **Download Instructions and Templates** page in the eContent Manager (when you log in with the iProcurement Catalog Administration responsibility). For subsequent releases of Oracle iProcurement, always check the Readme file in the eContent Manager for the latest information.

Introduction to the Catalog Structure

At a high level, there are two areas that define the catalog—the catalog data and the catalog schema.

Catalog data consists of the items and services available for purchase. The associated prices for these items and services are also considered part of the catalog data.

Catalog schema is comprised of a combination of categories, local descriptors (sometimes known as category attributes) used to describe items in a specific category, and base descriptors (sometimes known as base attributes) used to describe any item or service in the catalog.

There are two types of categories in the catalog. Together, these categories define the hierarchy:

- Item categories, also known as genus categories, are used to group similar items. Item categories are found at the lowest level of the category hierarchy; therefore an item category can never be a parent category to a child category. Every item in the catalog must belong to an item category.
- Browsing categories, also known as navigation categories (or master or intermediate level categories), are used to define the levels of the category hierarchy. These types of categories can be either a parent or child to another category, but cannot contain any items.

Local descriptors apply only to items within a specific item category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Local descriptors may vary from item category to item category and they are always optional.

Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. Some base descriptors, such as Supplier Item number, are required; others, such as Manufacturer, are optional.

Typically, catalog schema is loaded using a separate XML file (see the information on loading XML schema); however, there are some instances in which you may need to create both the schema and the item and price data in one file. There are three profile options that can be used to dictate whether you can include schema in your catalog XML file:

- *POR: Load Auto Category*. Setting this profile option to Yes ensures that if the loader encounters a category in the item section of the XML file that does not exist in the catalog, it will create the category. Setting this profile option to No will cause the loader to reject the item belonging to this category (unless you use the Apply Category Mapping option on the **Specify Options** page when bulk loading, and category mapping already exists in Oracle e-Commerce Gateway). The default for this profile option is No. If this profile option is set to Yes, you should provide both the name and key (in either order) when specifying a new category in your file. (This requirement does not apply to the other two profile options.) For example:

```
<OWNER>
  <KEY>UNSPSC_44121704</KEY>
  <NAME>Ball Point Pens</NAME>
</OWNER>
```

Or:

```
<OWNER>
  <NAME>Ball Point Pens</NAME>
  <KEY>UNSPSC_44121704</KEY>
</OWNER>
```

If you choose Yes for this profile option, you must map the new category to an internal category in Oracle Applications to successfully create requisitions for items in that category. See the online Help in the eContent Manager for more information on mapping.

Note: If mapping is successful after using the Apply Category Mapping option, the *POR: Load Auto Category* profile option is ignored.

- *POR:Load Auto Attrib.* Setting this profile option to Yes ensures that local descriptors referenced in the XML file that do not exist in the catalog will be created. Setting this profile option to No will cause the loader to reject the item that references the local descriptors. The default for this profile option is No.
- *POR:Load Auto Root.* Setting this profile option to Yes allows the loader to create base descriptors that are defined in the ROOT_DESCRIPTOR section of the XML file. Setting this profile option to No means the loader ignores the base descriptors that are defined for the item. The file will still load successfully, and the items will be created; however, the base descriptors will not be created. The default for this profile option is No.

Note: These profile options are only applicable when defining the catalog schema through the Catalog Data DTD. These profile options are ignored when creating catalog schema through the Catalog Schema DTD.

Using XML to Load the Catalog Data

Catalog content loaded into the catalog is divided into the following main sections:

1. Admin (required): Used to identify the catalog. Within the Admin section, you may optionally associate catalog content with one or more contract purchase agreements established in Oracle Purchasing.
2. Root Descriptors (optional): Used to define new base descriptors that are referenced in the Data section.
3. Data (required): Includes item information, price information, or both. The catalog data section may optionally contain local descriptors.

There are two additional sections, Schema and Hierarchy, that are used solely for supporting catalog files created for previous releases of Oracle iProcurement. New catalog files should not contain these two sections. For more information, see: Backwards Compatibility, page B-50.

The Catalog Data Document Type Definition (DTD)

A Document Type Definition (DTD) is a formal definition, or summary, of the requirements of a particular XML file. This DTD will help you structure your XML file. However, you can also use the example XML files in this document to help you create your XML file.

Your XML file must conform to the following World Wide Web Consortium (W3C) specifications:

- The W3C recommendation for Extensible Markup Language (XML) 1.0 at <http://www.w3.org/TR/2000/REC-xml-20001006>.
- The W3C proposed recommendation for Namespaces in XML at <http://www.w3.org/TR/1999/REC-xml-names-19990114>.
- The `xml:lang` attribute as described in Language Identification.

The Catalog Data DTD is provided in the Zip resources download. The DTD also exists in the `$OA_HTML` directory (or corresponding directory based on your platform). The DTD file name is `CatalogData.dtd`.

Version and Character Set Encoding

Every XML file must contain a line that indicates the version of XML you are using and any special encoding (or character set) you are using within the file. The version should always be 1.0. If your item descriptions and other catalog data use basic alphanumeric characters (a-z, AZ, 0-9, or any character with an ASCII code between 0 and 127), or if you used a UTF-8 editor to edit the file, you do not need to specify the encoding, so the beginning of your XML file can look like this:

```
<?xml version="1.0" ?>
```

When no document encoding is specified, UTF-8 is assumed.

If you are not using a UTF-8 editor and your catalog content includes special characters (such as the copyright or registered trademark symbols), accented characters (for example, é), or any characters that have a binary representation greater than 127, you must specify the character set in which your editor saves the file. For example, if you are creating the file in Spanish, using an ISO-8859-1 editor that supports Spanish characters, then you should also enter an encoding of ISO-8859-1 in your XML file, as follows:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
```

The system uses the encoding you specify in your XML file to "read" the contents of the file. If this encoding does not support the characters in the file nor matches the encoding in which the file was saved, the system produces an error and rejects the file with a Failed status.

Specify the encoding using the Internet Assigned Numbers Authority (IANA) registered character set names. A list of registered character sets is available from IANA at the following URL: <http://www.iana.org/assignments/character-sets>.

Language Identification

The XML documents that you submit must support language specifications using the `xml:lang` attribute as described in the Extensible Markup Language (XML) 1.0

W3C recommendation (visit <http://www.w3.org/TR> for all published and draft recommendations).

The following, extracted from the XML 1.0 specification, describes how language is identified:

- LanguageID ::= Langcode (- Subcode)*
LangCode ::= ISO639Code

According to the specification, the Langcode must be a two-letter language code as defined by ISO 639, Codes for the representation of the names of languages. The Subcode must be a country code from ISO 3166, Codes for the representation of names of countries. (See the list of language and territory codes in the table below.)

For example, the following illustrates setting the language to English and the country to the United States:

```
<CATALOG xml:lang="EN-US">
```

The language you specify must be installed in the Oracle iProcurement database. For more information on providing translations for catalog content, see: *Translating Catalogs*, page B-47.

The Oracle iProcurement catalog supports the following language code and territory code combinations, if the corresponding language is installed:

Valid Language and Territory Codes

Language	Language Code	Territory Code
American English	EN	US
Arabic	AR	AE
Brazilian Portuguese	PT	BR
British English	EN	GB
Bulgarian	BG	BG
Canadian French	FR	CA
Catalan	CA	CT
Croatian	HR	YU
Czech	CZ	CZ
Danish	DA	DK
Dutch	NL	NL
Egyptian	EG	EG
Finnish	FI	FI

Language	Language Code	Territory Code
French	FR	FR
German	DE	DE
Greek	EL	GR
Hebrew	IW	IL
Hungarian	HU	HU
Icelandic	IS	IS
Italian	IT	IT
Japanese	JA	JP
Korean	KO	KR
Latin American Spanish	ES	MX
Lithuanian	LT	LT
Norwegian	NO	NO
Polish	PL	PL
Portuguese	PT	PT
Romanian	RO	RO
Russian	RU	SU
Simplified Chinese	ZH	CN
Slovak	SK	SI
Slovenian	SL	SI
Spanish	ES	ES
Swedish	SV	SE
Thai	TH	TH
Traditional Chinese	ZH	TW
Turkish	TR	TR

Administrative Section

This section is required and is used to identify the catalog. Within this section, you may optionally associate catalog content with one or more contract purchase agreements or global contract agreements established in Oracle Purchasing.

Required and Validated Administrative Information

The following table describes the required administrative section fields:

Required and Validated Administrative Information

Tag	Required?	Default Value	Description and Validation
<NAME>	Required	(No default)	Name used to identify your file, for your own purposes. There is currently no validation performed on this value. The limit is 255 bytes.
<DATE>	Required	(No default)	Date of creation or modification. Use a date format of your choice; there is no validation performed on this value.
<SOURCE>	Required	(No default) Note: If catalogs are downloaded from Oracle Exchange, the source defaults to OEX.	Author of the XML document. Can be a person, company, or tool. There is no validation performed on this value.

Tag	Required?	Default Value	Description and Validation
<BUYER>	Required if CONTRACT_NUM is specified	(No default)	This is the operating unit defined in Oracle Applications in which the contract purchase agreement exists or in which the global contract agreement is enabled. If you are not using a multiple organizations setup (you have no operating units), enter All.
<CONTRACT_NUM>	Required if BUYER is specified	(No default)	This is the contract purchase agreement or global contract agreement defined in Oracle Purchasing. The contract must be valid (approved, but not expired) for the specified operating unit. (That is, it must be created or enabled in the specified operating unit.) In addition, the contract must be established for the same supplier and currency as all items and all other contracts within the catalog file. You cannot specify more than one contract per operating unit in the same file.

For information on contract purchase agreements, including how to enable global contract agreements in an operating unit, see the *Oracle Purchasing User's Guide*.

XML Example 1: Entering Administrative Information

```

<ADMIN>
  <NAME>Acme Winter Catalog 2003</NAME>
  <INFORMATION>
    <DATE>08-DEC-2003</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>

```


XML Example 2: Entering Administrative Information

```
<ADMIN>
  <NAME>Acme Winter Catalog 2003</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>  <!--SOURCE and DATE are interchangeable--
  >  <DATE>08-DEC-2003</DATE>
  </INFORMATION>
</ADMIN>
```

XML Example 3: Associating a Catalog with a Contract Purchase Agreement

```
<ADMIN>
  <NAME>Acme Winter Catalog 2003</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>08-DEC-2003</DATE>
  </INFORMATION>
  <CONTRACTS>
    <CONTRACT_REFERENCE>
      <BUYER>Vision Operations</BUYER>
      <CONTRACT_NUM>1357</CONTRACT_NUM>
    </CONTRACT_REFERENCE>
  </CONTRACTS>
</ADMIN>
```

XML Example 4: Associating a Catalog with Multiple Contract Purchase Agreements

```
<ADMIN>
  <NAME>Acme Winter Catalog 2003</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>08-DEC-2003</DATE>
  </INFORMATION>
  <CONTRACTS>
    <CONTRACT_REFERENCE>
      <BUYER>Vision Operations</BUYER>
      <CONTRACT_NUM>1357</CONTRACT_NUM>
    </CONTRACT_REFERENCE>
    <CONTRACT_REFERENCE>
      <BUYER>Vision Services</BUYER>
      <CONTRACT_NUM>9987</CONTRACT_NUM>
    </CONTRACT_REFERENCE>
  </CONTRACTS>
</ADMIN>
```

Contract Numbers and Operating Units

The CONTRACT_REFERENCE section dictates the following:

- For any item in the file that has my same BUYER (operating unit), use this CONTRACT_NUM (contract number).
- For any item in the file does not have my same BUYER (operating unit), do not use this CONTRACT_NUM (contract number). (Ignore the contract number for that item.)

- One exception exists to the above rules. For any item or price line in the file that has a blank (or All-Buyers) BUYER, the bulk loader loads two lines if a CONTRACT_NUM is also specified. One line specifies the item at the general price associated with the blank (or All-Buyers) operating unit. The other line specifies the item at that price, but associates it with the operating unit and contract number specified in the CONTRACT_REFERENCE section.

If more than one global contract agreement number is found in the enabled operating unit, then the most recently created global contract agreement is used. (For example, global contract agreement 123 was created in Operating Unit 1 and enabled in Operating Unit A. Another global contract agreement with that same number was created in Operating Unit 2 and enabled in Operating Unit A. If you specify contract number 123 and Operating Unit A in the CONTRACT_REFERENCE section, then the bulk loader chooses the most recently created contract.)

Data Types

Each descriptor comes with a data type. When you specify the item and price information in your file, be sure to use the correct data type for the descriptors. For example, Lead Time is a Number data type. If you enter the text four instead of the number 4 for Lead Time, the system gives you an error. You cannot create data types; any descriptor you specify must adhere to one of the data types listed below.

Text

Values for this descriptor must be text or numbers only. The values cannot be translated; they will always display the same in all languages.

Translatable Text

Values for this descriptor (text or numbers) can be translated; the system allows you to display different values for this descriptor in different languages. See: Translating Catalogs, page B-47.

Number

Values for this descriptor must be a number only. The values can contain decimals (such as .86). Except for price and lead time, the numbers can be negative.

Root Descriptors Section

The root descriptors section is optional. Its intent is to add base descriptors to the catalog that currently do not exist but are referenced in the catalog data section of the XML file. This feature is useful when loading catalogs that are received from an external source, such as Exchange.Oracle.com.

While this section may be used to create base descriptors, it is highly recommended that this function is controlled through the Catalog Schema DTD. One of the advantages of using the Catalog Schema DTD is that all of the schema information, including categories and local descriptors for the categories, is contained in a single file. Please see information on schema loading for further instructions and examples on using the Catalog Schema DTD.

If you decide to create base descriptors using the Root Descriptors section, you must ensure that the appropriate profile option is enabled in Oracle Applications. Refer to Introduction to the Catalog Structure, page B- 2 for more information.

Base descriptors may be created using the action commands: ADD, UPDATE, SYNC, DELETE.

Action commands ADD and UPDATE are internally converted to SYNC. SYNC adds a base descriptor if it is new and updates it if it already exists. If a base descriptor in the file has the same descriptor KEY and the same OWNER name or key as a base descriptor in the catalog, SYNC updates the descriptor; otherwise, SYNC adds the base descriptor to the catalog.

For detailed information on the default base descriptors that Oracle iProcurement already provides, see the information on schema loading.

Required and Validated Root Descriptors Information

The following table describes the required and validated root descriptor fields:

Root Descriptors Information

Tag	Required?	Description and Validation	Size (in Bytes)
<KEY>	Required	Internal identifier for the descriptor. The key must be unique. You cannot change the key once it is specified. <i>Default value:</i> No default.	250
<NAME>	Required when creating a new descriptor	Name of the descriptor that displays to users of Oracle iProcurement. It must be unique. <i>Default value:</i> No default.	250
<OWNER> <KEY>	Optional	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag), or both. In the Root Descriptors section, the owner should be 0 or not specified (omit the <OWNER> tag). <i>Default value:</i> 0.	250
<OWNER> <NAME>	Optional	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag), or both. <i>Default value:</i> Root Category.	250

Tag	Required?	Description and Validation	Size (in Bytes)
<TYPE>	Optional	Data type for the descriptor: Text, Translatable Text, or Number. See: Data Types, page B-10. You cannot update the type once it is specified. <i>Default value:</i> Translatable Text.	—
<DESCRIPTION>	Optional	Description of the descriptor, for your own purposes (does not display online). <i>Default value:</i> No default.	700
<SEARCH RESULTSVISIBLE>	Optional	Indicator of whether the descriptor displays in the search results. Valid values are 0 (for No) or 1 (for Yes). Note: After the following descriptors, only the first 11 search results visible descriptors in the sequence display in the search results, for space considerations: Thumbnail Image, Description, Long Description, Unit, Unit Price, Currency, Functional Currency Price, and Functional Currency (and Category). <i>Default value:</i> 0.	—

Tag	Required?	Description and Validation	Size (in Bytes)
<SEQUENCE>	Optional	<p>If the descriptor is displayed in the search results, the sequence number indicates the descriptor's display sequence on the Search Results Summary, Search Results, Item Detail, and Compare Item pages. Do not use decimals in your sequence numbers. (You can reuse an existing sequence number, if you need to. The descriptor will display next to the one with the same number.) For the sequence of existing base descriptors, see information on schema loading.</p> <p><i>Default value:</i> -1 (If you do not specify a sequence, Oracle iProcurement displays the descriptor after the default base descriptors that Oracle iProcurement provides.)</p>	—
<SEARCHABLE>	Optional	<p>Indicator of whether this descriptor will be searched by the search engine. Valid values are 0 (for No) or 1 (for Yes).</p> <p><i>Default value:</i> 1.</p>	—
<ITEMDETAIL VISIBLE>	Optional	<p>Indicator of whether you want this descriptor to display when someone in Oracle iProcurement views the details of an item or compares items. Valid values are 0 (for No) or 1 (for Yes).</p> <p><i>Default value:</i> 1.</p>	—

Note: In the Root Descriptors section, omit the OWNER. When OWNER is omitted, the catalog assumes you are creating a base descriptor.

XML Example 5: Creating Base Descriptors

The following is an excerpt from an XML file in which the base descriptor Country of Origin will be added to the catalog.

```
<ROOT_DESCRIPTOR>
  <DESCRIPTOR ACTION="SYNC">
    <KEY>COUNTRY_ORIGIN</KEY>
    <NAME>Country of Origin</NAME>
    <TYPE>Text</TYPE>
    <DESCRIPTION>Where the item originated or was manufactured</DESC
RIPTION>
    <SEARCHRESULTSVISIBLE>1</SEARCHRESULTSVISIBLE>
  </DESCRIPTOR>
</ROOT_DESCRIPTOR>
```

Catalog Data Section

The catalog data section is required and contains one or many item and price sections.

The item section consists of required base descriptors, such as Supplier and Supplier Item Number, and may also include optional base descriptors, such as Manufacturer or Lead Time.

The item section may also be used to create item categories and local descriptors for the categories, if the appropriate profile options described earlier are enabled in Oracle Applications. Creating new categories and descriptors is useful when loading catalogs that are received from an external source, such as Exchange.Oracle.com. It is recommended, however, that this function is controlled using the Catalog Schema DTD. One of the advantages of using the Catalog Schema DTD is that all of your schema information, including base descriptors, browsing categories, and the category hierarchy, is contained in a single file. The Catalog Schema DTD also offers increased flexibility over the Catalog Data DTD for maintaining local descriptors in the catalog. For example, certain tags, such as <TYPE>, can only be defined in the Catalog Schema DTD. If a local descriptor is created from the item section of the Catalog Data DTD, the default for this tag will be Translatable Text and cannot be changed. Please refer to the information on schema loading for further instructions and examples on using the Catalog Schema DTD.

The first time an item is added to the catalog, its price information, such as price, unit of measure, and currency, must be included in the item section of the XML file. Any subsequent price modifications should be handled through the price section of the XML file. (Although the item section could be used to maintain price information, the loader performs better when maintaining prices in the price section. When the XML parser loads the price section, the number of tables accessed is a small subset of the tables accessed when loading the item section of the XML file. For this reason, the item and price sections were designed to function independently of each other.)

Adding, Updating, and Deleting

Items and prices may be maintained using the action commands: ADD, UPDATE, SYNC, DELETE.

Action commands ADD and UPDATE are internally converted to SYNC. SYNC adds an item or price if it is new and updates it if it already exists.

Item Uniqueness

If the following item information in the file is the same as an existing item in the catalog, SYNC updates the item; otherwise, SYNC adds the item to the catalog as a new item:

- SUPPLIER
- SUPPLIER_PART_NUM
- BUYER
- SUPPLIER_PART_AUXID

Note: The item uniqueness criteria applies only within the ITEM section of the XML file.

For example, if two items have the same supplier, supplier part number, and buyer, but different supplier part auxiliary ID numbers, these will be separate items in the catalog:

Supplier	Supplier Part Number	Buyer (Operating Unit)	Supplier Part Auxiliary ID	Description
Acme	3255156	(none specified)	Green	Green T-shirt
Acme	3255156	(none specified)	Red	Red T-shirt

Note: Because the items in the example above are unique, they are treated as separate items. Notice that their descriptions differ. Any other descriptor that does not uniquely identify the item, such as Lead Time, can likewise differ between the two items. Similarly, to update this item, you need to provide two ITEM elements in the file, one to update the information (such as Lead Time) for the Green item and one to update the Red.

Price Uniqueness

If the following pricing information (also called a price list line) in the file is the same as an existing price list line in the catalog, SYNC updates the pricing information; otherwise, SYNC adds the new pricing to the catalog:

- SUPPLIER
- SUPPLIER_PART_NUM
- BUYER
- SUPPLIER_PART_AUXID
- CURRENCY
- SUPPLIER_SITE

Note: The price uniqueness criteria applies only within the PRICE section of the XML file.

For example, the following three items can coexist in the catalog because they do not all have the same supplier part auxiliary or supplier site:

Supplier	Supplier Part Number	Buyer (Operating Unit)	Supplier Part Auxiliary ID	Currency	Supplier Site
Acme	123456	Vision Operations	01	USD	San Jose
Acme	123456	Vision Operations	02	USD	San Jose
Acme	123456	Vision Operations	02	USD	Boston

Note: Because the price lines in the example above are unique, they are treated as separate price lines in the PRICE section. For example, specify the line with the Boston site to update or delete only that line. The PRICE section deletes only the line with the matching site. (Even if you leave the site blank, the PRICE section looks for the line with no site.) The ITEM section, however, does not use the site to uniquely identify the item. In the ITEM section, regardless of the site specified, the bulk loader deletes all items whose item uniqueness criteria match. In the example above, if you specified the line with the Boston site in the ITEM section, the bulk loader would delete all three lines.

Further Notes

If you specify the same item, with the same criteria as described in this section, more than once in the same file, the system processes the last identical entry and rejects the previous ones. For example, you specify a supplier of Acme, a supplier part number of 123456, a buyer of Vision Operations, a supplier part auxiliary ID of Green, and a description of *Green industrial tool box*. Later in the same file, you specify this same data, except that the description is *Green and gold industrial tool box*. This item is loaded with a description of *Green and gold industrial tool box*.

Items on requesters' favorites list are updated by the bulk loader.

Required and Validated Item Information

The following table describes the required and validated item section fields:

Note: The maximum byte lengths given in this document are not necessarily the same as character lengths. For example, 700 Japanese characters will typically be longer than 700 bytes, and a special symbol (though it is a single character), may be more than one byte. Therefore, the actual, byte limits are given below. How these translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

Item Section Fields

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
<OWNER> <KEY>	Required if NAME is not specified *	Item category to which the item belongs. The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. Unless <i>POR: Load Auto Category</i> is set to Yes, the category must be defined in Oracle iProcurement (or mapped to an internal category in Oracle e-Commerce Gateway). <i>Default value:</i> No default.	Text 250
<OWNER> <NAME>	Required if KEY is not specified *	(See description for <OWNER><KEY> above.) <i>Default value:</i> No default.	Text 250
SUPPLIER	Required	The supplier name specified here must match the corresponding supplier name defined in Oracle Applications, including using the same case. ** <i>Default value:</i> No default.	Text 240
SUPPLIER_PART_NUM	Required	Supplier item number. <i>Default value:</i> No default.	Text 25

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
SUPPLIER_PART_AUXID	Optional	Alternative part number or identifier for the item. For example, you could use this field to show that an item with the same SUPPLIER and SUPPLIER_PART_NUM can be purchased in two different units of measure (UOMs). Requesters would see the item (with the same supplier item number) twice, but with different UOMs in the Supplier Part Auxiliary ID field. <i>Default value:</i> No default.	Text 255
DESCRIPTION	Required when adding the item	Description of the item or service. <i>Default value:</i> No default.	Translatable Text 240
PRICE	Required when adding the item	Must be a number greater than or equal to 0, such as 10, 1.99, or 2,000. Must not use any special formatting, such as currency symbols. The system uses the language code in the file to interpret the decimal separator in the number. If the decimal separator is not valid for the specified language, then the bulk loader rejects the price line. See: Translating Catalogs, page B-47. <i>Default value:</i> No default.	Number —
UOM	Required whenever a PRICE is specified	Must be a valid UOM code defined in Oracle Applications. <i>Default value:</i> No default.	Text 30

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
BUYER	Required when a SUPPLIER_SITE is specified	Operating unit defined in Oracle Applications. If an operating unit is not specified here, this item is applicable to all operating units (All-Buyers). If <i>POR: Bulk Load for All Business Groups</i> is set to No, you can enter only an operating unit within your business group. (If it is set to Yes, you can enter any operating unit.) ** <i>Default value:</i> All Buyers.	Text 700
PRICELIST	Optional	One price list is allowed for each combination of supplier, operating unit (buyer), and currency. If no operating unit or price list is specified, the bulk loader defaults All-Buyers List Prices for the price list name. If an operating unit is specified, the bulk loader defaults the operating unit name followed by Price List—for example Vision Services Price List. <i>Default value:</i> All-Buyers List Prices or <Operating Unit> Price List	Text 90

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
CURRENCY	Required when a PRICE is specified	<p>Must be a valid currency code defined in Oracle Applications. You cannot update a price list's currency once you create it; however, you can create more than one price list per BUYER (operating unit), each with a different currency. See the price lists section following this table.</p> <p><i>Default value:</i> No default.</p>	Text 4
SUPPLIER_SITE	Optional	<p>The supplier site must meet the following criteria:</p> <p>Match the site name defined for that supplier in Oracle Applications. **</p> <p>Be enabled for the specified operating unit (BUYER). If the BUYER is blank or All-Buyers, the SUPPLIER_SITE must be blank.</p> <p>Be designated a Purchasing site in Oracle Applications.</p> <p>If associated with an Inactive On date, the date must be later than today.</p> <p>If a CONTRACT_NUM was specified, the SUPPLIER_SITE is ignored. Instead, the Supplier Site on the contract purchase agreement is used. For global contract agreements, the applicable Purchasing Site specified on the agreement is used.</p> <p><i>Default value:</i> No default.</p>	Text 100

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
MANUFACTURER	Optional	Name of the manufacturer of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.) <i>Default value:</i> No default.	Translatable Text 240
MANUFACTURER_PART_NUM	Optional	Manufacturer-assigned part number of each item or service. Typically, you would complete this field only if you are not the manufacturer of the listed item or service. (This information does not appear on the requisition.) <i>Default value:</i> No default.	Text 30
ALIAS	Optional	Alternate description or identifier for each item or service that people can enter when performing a search. For example, an alias for <i>soda</i> might be <i>pop</i> . To enter more than one alias, separate each alias with a comma—for example: <i>soda,pop,cola</i> . (This information does not appear on the requisition.) <i>Default value:</i> No default.	Translatable Text 700
LONG_DESCRIPTION	Optional	Detailed description of your item or service. (This information does not appear on the requisition.) <i>Default value:</i> No default.	Translatable Text 2000

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
PICTURE	Optional	<p>File name of the image that is associated with the item; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i>. Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif. (This information does not appear on the requisition.) See: <i>Loading Images, Oracle iProcurement Implementation Guide</i>.</p> <p><i>Default value:</i> No default.</p>	Text 700
PICTURE_URL	Optional	<p>No longer used. If, however, you used this descriptor in previous releases, you may still use it to provide an image URL. Note that if both PICTURE and PICTURE_URL are specified, PICTURE_URL is ignored.</p> <p><i>Default value:</i> No default.</p>	Text 150

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
THUMBNAIL_IMAGE	Optional	<p>File name of a smaller, thumbnail image for the item, for displaying on the Search Results Summary, Search Results, and Compare Items pages; for example: bluepen.gif. The image must reside on the local server, in the image directory specified in <i>POR: Hosted Images Directory</i>. Alternatively, you can enter a URL at which the image can be viewed. If so, enter the full URL; for example: http://www.us.oracle.com/logo.gif. (This information does not appear on the requisition.) See: <i>Loading Images, Oracle iProcurement Implementation Guide</i>.</p> <p><i>Default value:</i> No default.</p>	Text 700
ATTACHMENT_URL	Optional	<p>URL at which an attachment for each item or service can be viewed. Include the full URL; for example: http://www.us.oracle.com/attachment.gif. On the Item Details page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)</p> <p><i>Default value:</i> No default.</p>	Text (but displayed as a URL in search results and item details) 700

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
SUPPLIER_URL	Optional	<p>URL for the supplier's Web site. Include the full URL; for example: http://www.us.oracle.com. On the Item Details page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)</p> <p><i>Default value:</i> No default.</p>	<p>Text (but displayed as a URL in search results and item details)</p> <p>700</p>
MANUFACTURER_URL	Optional	<p>URL for the manufacturer's Web site. Include the full URL; for example: http://www.us.oracle.com. On the Item Details page, this URL displays in an Additional Information field. (This information does not appear on the requisition.)</p> <p><i>Default value:</i> No default.</p>	<p>Text (but displayed as a URL in search results and item details)</p> <p>700</p>
LEAD_TIME	Optional	<p>Amount of time, expressed in days, between the order date and the shipment date. Use any number greater than or equal to 0, such as 7 or 1.5. <i>Seven</i> is invalid. (This information does not appear on the requisition.)</p> <p><i>Default value:</i> No default.</p>	<p>Number</p> <p>—</p>

Tag/Key	Required?	Description and Validation	Data Type and Size (in Bytes)
ITEM_TYPE	Optional	Indicator of whether the item is a PRODUCT or SERVICE (use capital letters). Note: The ITEM_TYPE is for informational purposes only. There is no relationship between this value and line types specified in Oracle Applications. <i>Default value:</i> No default.	Text —
UNSPSC	Optional	The United Nations Standard Product and Service Code is an open, nonproprietary system of codes and standardized descriptions for classifying goods and services. To view a list of the UNSPSC codes, go to http://www.ecma.org . (This information does not appear on the requisition, nor is it validated against existing UNSPSC codes.) <i>Default value:</i> No default.	Text 700

* If the *POR:Load Auto Category* profile option is set to Yes, you should provide both the NAME and KEY. See: Introduction to the Catalog Structure, page B- 2 .

** If you're not sure of the exact name, you can change it later by selecting it from an Oracle Applications list of valid names on the **Specify Options** page just before you bulk load the file. See: Loading Your XML File, *Oracle iProcurement Implementation Guide*.

Required and Validated Price Information

The following table describes the required and validated price section fields:

Price Section Fields

Tag	Required?	Description and Validation	Data Type and Size (in Bytes)
<OWNINGITEM> <SUPPLIER>	Required	See the Required and Validated Item Information section, earlier, for a description and validation of the supplier. <i>Default value:</i> No default.	Text 240
<OWNINGITEM> <SUPPLIERITEM>	Required	See Required and Validated Item Information section, earlier, for a description and validation of the supplier item number. <i>Default value:</i> No default.	Text 25
<OWNINGITEM> <SUPPLIER_PART_AUXID>	Optional	See Required and Validated Item Information section, earlier, for a description and validation of the supplier part auxiliary ID. <i>Default value:</i> No default.	Text 255
<SUPPLIER_SITE>	Optional	See Required and Validated Item Information section, earlier. <i>Default value:</i> No default.	Text 100
<BUYER>	Required if a SUPPLIER_SITE is specified	See Required and Validated Item Information section, earlier. <i>Default value:</i> All Buyers.	Text 700

Tag	Required?	Description and Validation	Data Type and Size (in Bytes)
<PRICELIST>	Required if a BUYER is specified	See Required and Validated Item Information section, earlier. <i>Default value:</i> All-Buyers List Prices or <Operating Unit> Price List	Text 90
<CURRENCY AMOUNT> <AMOUNT>	Required	See Required and Validated Item Information section, earlier, for a description and validation of the price. <i>Default value:</i> No default.	Number —
<CURRENCY AMOUNT> <CURRENCY>	Required	See Required and Validated Item Information section, earlier, for a description and validation of the currency. <i>Default value:</i> No default.	Text 4
<UOM>	Required	See Required and Validated Item Information section, earlier. <i>Default value:</i> No default.	Text 30

Price Lists

For a given buyer, supplier, and currency, there can be only one price list; however, you can create more than one price list per buyer if the currencies are different.

For example, the following price lists can coexist because, in the first two price lists, the currencies are different and in the last price list, the operating unit is different:

Coexisting Price Lists

Price List Name	Buyer (Operating Unit)	Supplier	Currency
2003 Prices	Vision Services	Oracle	USD
2003 Prices	Vision Services	Oracle	GBP
2003 Prices	Vision Operations	Oracle	USD

The following price lists cannot coexist because the names are different; when uploading the price list 2003 Prices - Revised, Oracle iProcurement detects that a price list already exists for that operating unit, supplier, and currency, and it will not accept a new one:

Price Lists that Cannot Coexist

Price List Name	Buyer (Operating Unit)	Supplier	Currency
2003 Prices	Vision Services	Oracle	USD
2003 Prices - Revised	Vision Services	Oracle	USD

XML Example 6: Adding Items

In this example, two items for the supplier Acme are added to the catalog. Because no specific operating unit (BUYER) is given, the price is visible to all operating units. An item that is visible to all operating units is said to have a general (or list) price.

```
<?xml version="1.0" ?> <!-- version and character set
encoding information-->
<CATALOG xml:lang="EN-US"> <!--language identification-->
<ADMIN> <!--start of administrative section-->
<NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <DATE>13-MAR-2003</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN> <!--end of administrative section-->
```

```

<DATA> <!--start of catalog data section-->
<ITEM ACTION="SYNC"> <!--start of first item, including general p
rice-->
  <OWNER>
    <NAME>Ball Point Pens</NAME> <!--specify category name, key,
or both -->
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9001</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>DESCRIPTION</NAME>
    <VALUE>BIC Ball Point Pens, 12 Pack, Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>MANUFACTURER</NAME>
    <VALUE>Bic, Inc.</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>TYPE</NAME> <!--local descriptor key or name for the ca
tegory Ball Point Pens-->
    <VALUE>Ball Point</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>INK_COLOR</NAME> <!--local descriptor key or name for t
he category Ball Point Pens-->
    <VALUE>Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICE</NAME>
    <VALUE>3.99</VALUE> <!--general price applicable to all opera
ting units-->
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>UOM</NAME>
    <VALUE>DZ</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>CURRENCY</NAME>
    <VALUE>USD</VALUE>
  </NAMEVALUE>
</ITEM> <!--end of item section for item MW9001-->

```

```

    <ITEM ACTION="SYNC" <!--start of second item, including
general price-->
    <OWNER>
      <NAME>Ball Point Pens</NAME>
      <KEY>BALL_POINT_PENS</KEY>
    </OWNER>
    <NAMEVALUE>
      <NAME>SUPPLIER</NAME>
      <VALUE>Acme</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>SUPPLIER_PART_NUM</NAME>
      <VALUE>MW9002</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>DESCRIPTION</NAME>
      <VALUE>BIC Ball Point Pens, 12 Pack, Red</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>MANUFACTURER</NAME>
      <VALUE>Bic, Inc.</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>TYPE</NAME>
      <VALUE>Ball Point</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>INK_COLOR</NAME>
      <VALUE>Blue</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>PRICE</NAME>
      <VALUE>2.99</VALUE> <!--general price applicable to all opera
ting units-->
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>UOM</NAME>
      <VALUE>DZ</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>CURRENCY</NAME>
      <VALUE>USD</VALUE>
    </NAMEVALUE>
  </ITEM> <!--end of item section for item MW9002-->

</DATA> <!--end of catalog data section-->
</CATALOG> <!--end of catalog-->

```

XML Example 7: Adding Operating Unit-Specific Items

This example shows how to create operating unit-specific items and prices.

If both this and the previous example are bulk loaded, items MW9001 and MW9002 cost 3.99 and 2.99 USD respectively for all operating units except Vision Operations, where they cost 3.70 and 2.80 EUR respectively. If just this example is bulk loaded, items MW9001 and MW9002 are available only to people in the Vision Operations operating unit, at a cost of 3.70 and 2.80 EUR respectively.

```
<?xml version="1.0" ?> <!-- version and character set
encoding information-->
<CATALOG xml:lang="EN-US"> <!--language identification-->
<ADMIN> <!--start of administrative section-->
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <DATE>13-MAR-2003</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN> <!--end of administrative section-->
```

```

<DATA> <!--start of catalog data section-->
<ITEM ACTION="SYNC"> <!--start of first item, including operating
unit price-->
  <OWNER>
    <NAME>Ball Point Pens</NAME>
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9001</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>DESCRIPTION</NAME>
    <VALUE>BIC Ball Point Pens, 12 Pack, Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>MANUFACTURER</NAME>
    <VALUE>Bic, Inc.</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>TYPE</NAME>
    <VALUE>Ball Point</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>INK_COLOR</NAME>
    <VALUE>Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICE</NAME>
    <VALUE>3.70</VALUE> <!--operating unit-specific price-->
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>UOM</NAME>
    <VALUE>DZ</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>CURRENCY</NAME>
    <VALUE>EUR</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>BUYER</NAME>
    <VALUE>Vision Operations</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICELIST</NAME>
    <VALUE>Vision Operations Prices</VALUE>
  </NAMEVALUE>
</ITEM> <!--end of item section for item MW9001-->

```



```

<ITEM ACTION="SYNC"> <!--start of second item, including
operating unit price-->
  <OWNER>
    <NAME>Ball Point Pens</NAME>
    <KEY>BALL_POINT_PENS</KEY>
  </OWNER>
  <NAMEVALUE>
    <NAME>SUPPLIER</NAME>
    <VALUE>Acme</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>SUPPLIER_PART_NUM</NAME>
    <VALUE>MW9002</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>DESCRIPTION</NAME>
    <VALUE>BIC Ball Point Pens, 12 Pack, Red</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>MANUFACTURER</NAME>
    <VALUE>Bic, Inc.</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>TYPE</NAME>
    <VALUE>Ball Point</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>INK_COLOR</NAME>
    <VALUE>Blue</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICE</NAME>
    <VALUE>2.80</VALUE> <!--operating unit-specific price-->
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>UOM</NAME>
    <VALUE>DZ</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>CURRENCY</NAME>
    <VALUE>EUR</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>BUYER</NAME>
    <VALUE>Vision Operations</VALUE>
  </NAMEVALUE>
  <NAMEVALUE>
    <NAME>PRICELIST</NAME>
    <VALUE>Vision Operations Prices</VALUE>
  </NAMEVALUE>
</ITEM> <!--end of item section for item MW9002-->

</DATA> <!--end of catalog data section-->
</CATALOG> <!--end of catalog-->

```

XML Example 8: Updating Prices

In this example, the following updates are made:

- The general price for Supplier Item number MW9001 created in XML Example 6 is updated. Since a BUYER is not specified, this price change affects all operating units except Vision Operations.
- The operating unit-specific price for Supplier Item number MW9001 created in XML Example 7 is updated. This price change affects only the Vision Operations operating unit.
- A new price for MW9001 is added. This new price is visible only in the Vision Operations operating unit. The Vision Operations operating unit now has two prices for MW9001—one for 5.55 and one for 4.00 for any item coming from the Bonn site.

Note: This example assumes the items were already added to the Vision Operations operating unit using XML Example 7. Use the PRICE element only to update the prices of items that already exist (that were created using the ITEM element). Otherwise, the items will be rejected.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>14-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

  <DATA>
    <PRICE ACTION="SYNC">
      <OWNINGITEM>
        <SUPPLIER>Acme</SUPPLIER>
        <SUPPLIERITEM>MW9001</SUPPLIERITEM>
      </OWNINGITEM>
      <CURRENCYAMOUNT>
        <AMOUNT>5.99</AMOUNT> <!--increased price to 5.99 USD for all
operating units except Vision Operations -->
        <CURRENCY>USD</CURRENCY>
      </CURRENCYAMOUNT>
      <UOM>DZ</UOM>
    </PRICE>
```

```

<PRICE ACTION="SYNC">
  <OWNINGITEM>
    <SUPPLIER>Acme</SUPPLIER>
    <SUPPLIERITEM>MW9001</SUPPLIERITEM>
  </OWNINGITEM>
  <BUYER>Vision Operations</BUYER>
  <PRICELIST>Vision Operations Prices</PRICELIST>
  <CURRENCYAMOUNT>
    <AMOUNT>5.55</AMOUNT>  <!--changed price for Vision Operations
only -->
  <CURRENCY>EUR</CURRENCY>
  </CURRENCYAMOUNT>
  <UOM>DZ</UOM>
</PRICE>

<PRICE ACTION="SYNC">
  <OWNINGITEM>
    <SUPPLIER>Acme</SUPPLIER>
    <SUPPLIERITEM>MW9001</SUPPLIERITEM>
  </OWNINGITEM>
  <BUYER>Vision Operations</BUYER>
  <PRICELIST>Vision Operations Prices</PRICELIST>
  <CURRENCYAMOUNT>
    <AMOUNT>4.00</AMOUNT>  <!--added price for Vision Operations,
for the Bonn site only -->
  <CURRENCY>EUR</CURRENCY>
  </CURRENCYAMOUNT>
  <UOM>DZ</UOM>
  <SUPPLIER_SITE>BONN</SUPPLIER_SITE>
</PRICE>

</DATA>
</CATALOG>

```

XML Example 9: Updating an Item

In this example, the description and ink color of Supplier Item number MW9001 created in XML Example 6 is updated.

Using both this and the previous examples, this item is updated in all operating units except Vision Operations, since no BUYER is specified. To update the item in Vision Operations, you would need to add another ITEM element to this example for item MW9001, identical to the first ITEM element, except specifying Vision Operations as the BUYER.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <DATE>14-MAR-2003</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>

```

```

<DATA>
  <ITEM ACTION="SYNC">
    <OWNER>
      <KEY>BALL_POINT_PENS</KEY>
    </OWNER>
    <NAMEVALUE>
      <NAME>SUPPLIER</NAME>
      <VALUE>Acme</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>SUPPLIER_PART_NUM</NAME>
      <VALUE>MW9001</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>DESCRIPTION</NAME>
      <VALUE>BIC Ball Point Pens, 12 Pack, Black</VALUE> <!--changed
Blue to Black-->
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>INK_COLOR</NAME>
      <VALUE>Black</VALUE> <!--changed ink color from Blue to
Black
-->
    </NAMEVALUE>
  </ITEM>
</DATA>
</CATALOG>

```

XML Example 10: Providing a Supplier Part Auxiliary ID

This example specifies a SUPPLIER_PART_AUXID for MW9001. Since SUPPLIER_PART_AUXID is used to uniquely identify an item (along with SUPPLIER, SUPPLIER_PART_NUM, and BUYER), the bulk loader does not update SKI-123 with the SUPPLIER_PART_AUXID. Instead, the bulk loader creates a new item: the existing item MW9001, with no SUPPLIER_PART_AUXID, stays in the catalog; MW9001, with a SUPPLIER_PART_AUXID of Green, is now an additional item in the catalog.

```

<?xml version="1.0" ?>

<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>14-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

```

```

<DATA>
  <ITEM ACTION="SYNC">
    <OWNER>
      <KEY>BALL_POINT_PENS</KEY>
    </OWNER>
    <NAMEVALUE>
      <NAME>SUPPLIER</NAME>
      <VALUE>Acme</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>SUPPLIER_PART_NUM</NAME>
      <VALUE>MW9001</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>SUPPLIER_PART_AUXID</NAME>    <!--created a new item by p
roviding a SUPPLIER_PART_AUXID-->
      <VALUE>Green</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>DESCRIPTION</NAME>
      <VALUE>BIC Ball Point Pens, 12 Pack, Black</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>INK_COLOR</NAME>
      <VALUE>Black</VALUE>
    </NAMEVALUE>
  </ITEM>

</DATA>
</CATALOG>

```

XML Example 11: Deleting an Item

In this example, Supplier Item number MW9002 that was created in XML Example 6 is deleted.

Using both this and the previous examples, this item is deleted in all operating units except Vision Operations, since no BUYER is specified. To delete the item from Vision Operations, you would need to add another ITEM ACTION="DELETE" element for item MW9002, identical to the first ITEM ACTION="DELETE" element, except specifying Vision Operations as the BUYER.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>13-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

```

```

<DATA>
  <ITEM ACTION="DELETE"> <!--start of item section, deleting the
item-->
    <OWNER>
      <KEY>BALL_POINT_PENS</KEY>
    </OWNER>
    <NAMEVALUE>
      <NAME>SUPPLIER</NAME>
      <VALUE>Acme</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>SUPPLIER_PART_NUM</NAME>
      <VALUE>MW9002</VALUE>
    </NAMEVALUE>
  </ITEM>
</DATA>
</CATALOG>

```

Note: Using the ITEM section to delete an item deletes all its associated pricing, for the specified BUYER. For example, if the item has multiple prices for a single BUYER, which vary by currency or supplier site, then deleting this item using the ITEM section also deletes its multiple prices. Items and prices in other operating units are not deleted.

XML Example 12: Deleting Item Prices

In this example, the operating unit-specific price for Supplier Item number MW9001, last updated in XML Example 8, is deleted. Only the Vision Operations price for the Bonn site is deleted, not the item and not the other list prices or operating unit-specific prices for the item.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <DATE>14-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

```

```

<DATA>
  <PRICE ACTION="DELETE"> <!--start of price section, deleting price-->
    <OWNINGITEM>
      <SUPPLIER>Acme</SUPPLIER>
      <SUPPLIERITEM>MW9001</SUPPLIERITEM>
    </OWNINGITEM>
    <BUYER>Vision Operations</BUYER>
    <PRICELIST>Vision Operations Prices</PRICELIST>
    <CURRENCYAMOUNT>
      <AMOUNT>4.00</AMOUNT>
      <CURRENCY>EUR</CURRENCY>
    </CURRENCYAMOUNT>
    <UOM>DZ</UOM>
    <SUPPLIER_SITE>BONN</SUPPLIER_SITE>
  </PRICE> <!--end of price section-->

</DATA>
</CATALOG>

```

Case Sensitivity

Some values are case sensitive and will be considered as updated if their case has changed. All values are case sensitive except the following values:

- Category name and key (for example, Ball Point Pens)
- Descriptor name and key (for example, Ink Color or LEAD_TIME)
- Unit (for example, EA)
- Supplier Site

For example, you can specify the category as Ball Point Pens or Ball point pens, and they would be treated as the same. Your item would be added to the category Ball Point Pens. But the supplier item number AB457Z would be treated as a different item number than ab457z. The system would add ab457z to the catalog if AB457Z already exists.

Reclassifying an Item Under Another Category

If you want to move items formerly under one category, such as Ball Point Pens, to another category, such as Felt Pens, list all of the items under Felt Pens using the SYNC action. (You cannot have the same item in more than one category.)

Note: When you move an item from one category to another, you lose the local descriptors. For example, you originally add an item under the category Felt Pens, using Tip Width and Ink Color as local descriptors. You then move the item to Ball Point Pens. The item will no longer display the Tip Width and Ink Color you specified, even if Ink Color exists in the new category. Local descriptors are specific to each category.

Blanking Out a Descriptor

If you want to delete the value for a particular descriptor for an item, blank it out using the text #DEL as shown below. You cannot blank out values for required descriptors or for the SUPPLIER_PART_AUXID. (To delete the SUPPLIER_PART_AUXID for an item, you would need to delete the item and recreate it without the SUPPLIER_PART_AUXID.)

XML Example 13: Deleting Values

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <DATE>15-JAN-2001</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>

<DATA>
  <ITEM ACTION="SYNC">
    <OWNER>
      <KEY>BALL_POINT_PENS</KEY>
    </OWNER>
    <NAMEVALUE>
      <NAME>SUPPLIER</NAME>
      <VALUE>Acme</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>SUPPLIER_PART_NUM</NAME>
      <VALUE>MW9002</VALUE>
    </NAMEVALUE>
    <NAMEVALUE>
      <NAME>Type</NAME>
      <VALUE>#DEL</VALUE>    <!-- blank out the value -->
    </NAMEVALUE>
  </ITEM>
</DATA>
</CATALOG>
```

In this example, item MW9002 no longer has a value for Type in the catalog. The Type local descriptor itself still displays, but for item MW9002, no value exists for Type.

Using the Bulk Loader with Extracted Items

You can use the bulk loader to update any extracted item that has a supplier and supplier part number associated with it. For example, the extractor does not include manufacturer information with the items; however, you could use the bulk loader to specify a manufacturer for an extracted item.

Recall the rules discussed in the earlier section on adding, updating, and deleting items. These rules determine whether you are updating an item or creating a new item. For example, if you provide a supplier part auxiliary ID for an extracted item, the bulk loader creates a new item.

Note: In general, you should extract an item first, then bulk load updates to it if desired. If you bulk load the item first, then extract it, the item may not be updated, but may be created as a new item.

You cannot update the category of extracted items. For extracted items, you can use the bulk loader to change only the following descriptors (in addition to any new descriptors you may have added to the catalog):

- Manufacturer

- Manufacturer Item number
- Description
- Long Description
- Alias
- Attachment URL
- UNSPSC Code
- Availability
- Lead Time
- Item Type
- Image Thumbnail Image
- Supplier URL
- Manufacturer URL

Using the bulk loader, you cannot delete items that were extracted from Oracle Purchasing. To delete items that are considered extracted, delete them in Oracle Applications, then rerun the item extractor.

Reviewing and Saving Your XML File

See the tables in the previous sections to be sure that the information in your XML file will validate successfully. Make sure your XML file is formatted properly according to the DTD and examples in this document.

Note: Open the completed XML file in Internet Explorer to check for syntax errors in the file. (Internet Explorer does not validate the document against the DTD, but checks for syntax errors such as a missing `</ADMIN>` at the end of the ADMIN section.) If the file's syntax is correct, it opens successfully in Internet Explorer. Otherwise, Internet Explorer presents an error.

Save your XML file with a .xml extension. You can give the file any name. (If you left the NAME in the ADMIN section blank, the bulk loader stores the file name in the system.)

The bulk loader has no file size limitations; however, larger files may take some time to load.

Loading Your XML File

Once you have created and reviewed your XML file, load it to Oracle iProcurement as follows:

Loading the File

Follow these steps to load the file:

1. Use the iProcurement Catalog Administration responsibility to access the eContent Manager home page.
2. Expand "Load Data & Schema" and click "Manage Loading" to open the **Loader Jobs** page.

3. On the **Loader Jobs** page, click Upload Items.
4. Enter the File Name and path, or click Browse to navigate to your XML (.xml) file.
5. For File Type, select XML.
6. Click Continue.
7. If you would like to replace certain values, such as Supplier and Supplier Site, for all items in your catalog file, then specify the following optional fields:

- Select a Supplier if you wish to replace the Supplier specified in the file.
- Select an Operating Unit for which all items in the file are applicable. If *POR: Bulk Load for All Business Groups* is set to No, then you can select only operating units that are in your business group.

This Operating Unit replaces the line-level operating units specified in the file. It does not replace the operating unit in the Contract Reference section of the file, if specified. (The operating unit that you select here does affect the Contract Reference section, however. A contract specified in the Contract Reference section is applied only to those lines whose operating units match its own. See the information on contract numbers and operating units in Administrative Section, page B- 6 .)

- Select a Supplier Site* to load these items for a particular Supplier Site. Oracle iProcurement displays only the list of sites valid for the selected operating unit and supplier. If global contract agreements exist in Oracle Purchasing, then the list additionally includes purchasing supplier sites that are associated with the operating units in which the contract is enabled.
- You may optionally select a Contract Purchase Agreement* that is applicable to all items in the file. (If you already specified one or more agreements in the file, then the agreement you select here replaces those.)

Oracle iProcurement retrieves this list of valid agreements from Oracle Purchasing, for the Operating Unit and Supplier you chose. The list of contract purchase agreements from which you can choose consists of the following:

- Contract purchase agreements that were created in the selected Operating Unit (known as the *owning organization*) and that are valid for the selected Supplier Site, if a site was selected.
- Global contract purchase agreements that were enabled in the selected Operating Unit and whose purchase sites match the selected Supplier Site, if a site was selected. (The enabled operating unit is known as the *requesting organization*. Global contract agreements are associated with a *purchasing site*, which is the site with which the purchase order is ultimately created.)

For more information on global agreements, see the *Oracle Purchasing User's Guide*.

- Select Yes or No for Negotiated Prices. Use this field if you are or will be implementing Daily Business Intelligence (DBI) for Procurement. If you select Yes, then DBI for Procurement considers all items from this supplier to have negotiated prices, for reporting purposes. For more information, see the *Oracle E-Business Intelligence Daily Business Intelligence User Guide*.

* This option is only available when you select an Operating Unit and Supplier.

8. Choose whether you want to apply category mapping to the file.

If you choose Yes, Oracle iProcurement checks whether category mapping is set up in Oracle e-Commerce Gateway. If a category in the bulk load file matches a category that is mapped in Oracle e-Commerce Gateway and that has been extracted to the catalog, the bulk loader adds the item to the mapped category. For more information and examples, see the online Help in the eContent Manager.

9. Click Upload to send your file.

As soon as the load is started, the screen displays a confirmation message and job number.

Checking the Job Status in the eContent Manager

To check the status of your job, return to the **Loader Jobs** page. The **Loader Jobs** page tells you the status of your entire job:

- Pending (waiting to be processed)
- Running (processing the file)
- Completed

If you included one or more contract references in your file which were successfully loaded, the bulk loader counts these as separate lines, in addition to successfully loaded item or price lines in the file.

- Failed (did not load the file at all because of a format or encoding error, or loaded the file but rejected some of its lines)

Note: If the entire file failed and you cannot determine why, use the Requests window in Oracle Applications as described below.

Large files may take some time to load. You do not need to remain logged in while your job completes. If you need, click the Refresh or Reload button on your browser to update the status.

Using the Requests Window to Check the Job Status

As an alternative to the **Loader Jobs** page, you can also view bulk load jobs in Oracle Applications:

1. In Oracle Applications, in the Oracle Purchasing or System Administration responsibilities, navigate to the View Requests window as follows:

From Oracle Purchasing: Requests

From System Administration: Requests > View

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

2. In the Find Requests window, choose to find all requests or enter a specific Request ID, Name, or other information.

The bulk load number assigned to your bulk load job in the eContent Manager is the same as the Request ID. The request name is Catalog Bulk Load - Items & Price Lists.

The Requests window uses different status readings for its jobs. For example, a bulk load file with a status of Failed on the **Loader Jobs** page has a status of Completed - Warning in the Requests window.

3. You may be able to see more details about the bulk load and errors using the View Log button.

If you still cannot determine the cause of an error using the log, temporarily set the profile option *POR: Set Debug Catalog Loader ON* to Yes with Detail and bulk load the file again. Setting this profile option to Yes or Yes with Detail displays a more detailed log of the bulk load process for that job. (This profile option should be set to Yes or Yes with Detail only while troubleshooting.)

Resolving Errors

The **Loader Jobs** page alerts you to failures or rejected lines in your XML file. Oracle iProcurement looks for errors in your file in two phases: format errors and validation errors.

Format errors (failures)

Format errors occur when the XML file fails validation against the DTD. Some examples of format errors include special characters in your file that are not covered by the character set specified in the `<?xml version="1.0" ?>` element, or a syntactic error such as forgetting to end the administrative section with `</ADMIN>`. If a format error is encountered, the load process stops, and a Failed status is returned.

If your job fails, fix the file and resubmit it for processing.

Validation errors (rejected lines)

Once format errors, if any, are resolved, Oracle iProcurement checks for validation errors. Validation errors occur when information that you entered in your XML file does not match corresponding information already held within Oracle iProcurement or Oracle Applications. For example, if you enter values for UOM or CURRENCY that Oracle Applications does not recognize, a validation error will occur. The individual `<ITEM>` or `<PRICE>` elements on which the validation errors occurred will be rejected.

If your job contains rejected lines, click the Rejected Lines number for the job to view the errors. Fix the file and resubmit it for processing.

Handling Special Characters

If you want to include special characters (such as `&`, or `<>`) in your XML file, use the CDATA tag as follows:

```
<NAMEVALUE>  
  <NAME>DESCRIPTION</NAME>  
  <VALUE><![CDATA[Pen & Pencil Gift Set<-- SPECIAL DEALS]]></VALUE>  
</NAMEVALUE>
```

Use the CDATA tag only for special characters that have meaning in XML. For example, the less-than character (`<`) has special meaning in XML. If you do not enclose it within CDATA tags, then the file fails XML processing. For accents or other language-specific characters, you must use the proper encoding. See Version and Character Set Encoding, page B- 4 .

If you want to include special characters (such as the copyright symbol) in your text file, follow the steps below. You only need to follow these steps if the special characters are not supported by the encoding in which the file was saved. For example, a file created in Germany likely supports saving files with umlaut characters, and you do

not have to follow these instructions for inserting umlaut characters. Follow these instructions if the encoding in which your file is saved does not support the special character. The copyright symbol is an example.

These steps are just one method for copying special characters into the bulk load file. You may have other methods.

To insert special characters in your bulk load file:

1. Open your bulk load file.
2. Access the Character Map utility in Windows.

Depending on your computer's configuration, you may be able to find this utility in the Start menu: choose Program, then Accessories, then System Tools.

3. Select the proper encoding for the contents of the file. For example, if the contents of the file are in German, select the Windows Western encoding. See Version and Character Set Encoding, page B-4.

You may find the encoding in a Subset drop-down menu or in an advanced view area of the Character Map window.

4. In the Characters to Copy field, double-click the special character from the characters display in the Character Map window.

You may need to select a font such as Times New Roman from the Font menu in the Character Map window.

5. Copy and paste the text or character from the Characters to Copy field to your file.
6. Make sure the proper encoding is entered in the file, as usual, according to the language contents of the file. See Version and Character Set Encoding, page B-4.
7. Save and upload your file.

An alternative to using the Character Map utility is to use the "Alt" number key sequence for the special character. (Hold down the Alt key while entering the number sequence. You must use the number keypad on your keyboard to enter the numbers.) For example, *Alt* + 0169 gives the Copyright © symbol. These numbers are the decimal equivalents of a letter. For example, 065 is the decimal equivalent of A.

Note: Do not use HTML code or character sequences, or Java scripts, in the bulk load file. For security reasons, Oracle Applications Framework (the technology upon which Oracle iProcurement is built) ignores these. For example, `Buy Now` displays as `Buy Now` in the catalog. The sequence `©` (instead of the copyright symbol) causes a format failure. (The following special character sequences are exceptions and do work, even without a CDATA tag: `&` for ampersand, `<` for less-than, and `>` for greater-than. For example, `&` displays as `&` in the catalog.)

Loading Images

You can specify or load two kinds of images for items:

- Images that display on the **Item Details** page when requesters view the details of an item. (Use the Image field in the bulk load file.)

- Smaller, thumbnail versions of the images that display on the **Search Results Summary**, **Search Results**, and **Compare Items** pages. (Use the Thumbnail Image in the bulk load file.)

For a complete overview of image management, including recommendations on thumbnail image sizes, see the Image Management section of the *Oracle iProcurement Implementation Guide*.

There are two ways to associate items with images in your bulk load file:

- Copy the images to the local server and indicate the image file names in the XML file.
- Reference the URLs of the images in the XML file.

To copy the images to the local server:

1. For the *POR: Hosted Images Directory* profile option, enter the directory path you use to store image files.

This path usually corresponds to the OA_MEDIA directory. Contact your database administrator or installation team for the exact location of your OA_MEDIA directory.

Behind the scenes, the catalog uses the *Application Framework Agent* and *POR: Hosted Images Directory* profile options to locate the image. For example, if *Application Framework Agent* is set to `http://abc.com:8888` and *POR: Hosted Images Directory* is set to `/OA_MEDIA/US/`, then the catalog locates the image `abc.gif` at `http://abc.com:8888/OA_MEDIA/US/abc.gif`. (If you specify a full URL, such as `http://abc.com:8888/abc.gif`, in the bulk load file, then the catalog goes directly to that URL. The catalog constructs the URL based on the profile options described here only when a catalog image name, with no URL, is specified in the bulk load file.)

2. Ask your database administrator to transfer the pictures to the directory you specified above.
3. Use the `<NAMEVALUE>` tags within the item section of your XML file.

For example, to specify an image for the **Item Details** page:

```
<NAMEVALUE>
  <NAME>PICTURE</NAME>
  <VALUE>bluepen.gif</VALUE>
</NAMEVALUE>
```

To specify a thumbnail image for the search results and comparison pages:

```
<NAMEVALUE>
  <NAME>THUMBNAIL_IMAGE</NAME>
  <VALUE>bluepen_thumb.gif</VALUE>
</NAMEVALUE>
```

Note: The file name for the image is case sensitive. For example, if the image file name is `bluepen.gif`, but you specify `BluePen.gif` in the Image field, the image will not display.

4. Load your XML file.

To specify the URL of the image that resides on the Internet:

1. Obtain the full path of the image (for example, `http://www.oracle.com/toplogo2.gif`).

2. Use the <NAMEVALUE> tags within the item section of your XML file.

For example, to specify an image for the **Item Details** page:

```
<NAMEVALUE>
  <NAME>PICTURE</NAME>
  <VALUE>http://www.oracle.com/logo.gif</VALUE>
</NAMEVALUE>
```

To specify a thumbnail image for the search results and comparison pages:

```
<NAMEVALUE>
  <NAME>THUMBNAIL_IMAGE</NAME>
  <VALUE>http://www.oracle.com/logo_thumb.gif</VALUE>
</NAMEVALUE>
```

3. Load your XML file.

If you specify both an image URL (using the old PICTURE_URL field) and a server image (using PICTURE) for an item, Oracle iProcurement displays the server image.

Note: Instead of creating separate detail and thumbnail images, you could use the same image file name or URL for both the Image and Thumbnail Image fields. Then set either the *POR: Thumbnail Width* or *POR: Thumbnail Height* profile option to resize the image for thumbnails.

Translating Catalogs

You can load your catalog items in any or all of the languages that Oracle iProcurement supports. The language you specify in your file must be installed in the Oracle iProcurement database.

When you add an item to the catalog, it is added only in the language specified at the beginning of your XML file. To provide your catalog items in another language, translate the XML file and load it again specifying the supported language and the action command SYNC.

When you delete an item, specifying an action of DELETE, the item is deleted for all languages installed in the Oracle iProcurement database.

When an item is created in another language, only the translatable descriptors (those with a Translatable Text data type) must be specified in the XML file (along with minimally required values). All of the non-translatable descriptors, such as Manufacturer Item number, are automatically inherited from the original language in which the item was created. If you change the value of a non-translatable descriptor when loading the translated file, the change will appear in all languages installed in the Oracle iProcurement database. Only translatable descriptors can vary by language. For example, if you change the Manufacturer Item number in one language, it is changed in all languages; however, when you change the item's Description, it is changed only in the language specified in the file.

Load your catalog items in one language at a time. For example, load your catalog items in English, using the "EN-US" language code, then translate and load that catalog file in French using the "FR-FR" language code.

The information that is needed to translate an item includes:

- SUPPLIER (for validation purposes) - required

- SUPPLIER_PART_NUM (for validation purposes) - required
- Category (using the <OWNER> tag) (for validation purposes) - required
- SUPPLIER_PART_AUXID (for validation purposes) - required if the item you are translating has a SUPPLIER_PART_AUXID. The SUPPLIER_PART_AUXID is used to uniquely identify an item.
- Item DESCRIPTION (for validation purposes and translation, if applicable) - required when adding an item for the first time to any language
- Descriptors whose TYPE=Translatable Text, if applicable - optional

Categories and Descriptors

As with any catalog items you load into the catalog, the category name or key and local descriptor name or key in your translated file must match exactly those given in the foreign language catalog. The key will be the same in all languages, but its name may be different. When translating your items, you may reference either the category name in that language or the category key. In the following example, the category key in all languages is Ball Point Pens, but the category name in Spanish is Bolígrafos:

Tag	EN-US	ES-ES
<NAME>	Ball Point Pens	Bolígrafos
<KEY>	Ball Point Pens	Ball Point Pens

The same is true for local descriptors, such as Ink Color and any base descriptor. For example, the key for the supplier item number is always SUPPLIER_PART_NUM, but the name, Supplier Item, will vary across languages. You may reference either the name (in the specified language) or the key.

Pricing

Pricing does not need to be included in the translated file. When an item is translated to another language, its pricing is also automatically copied over to that language. You could omit the pricing information in your translated file.

As with all non-translatable descriptors, if you change the pricing information in one language, it is changed in all languages. For example, you bulk load an item that costs 2 USD, specifying EN-US (English) in the file. Later, you change EN-US to FR-FR (French) and change the price from 2 USD to 4 USD. The price is changed in all languages.

In another example, you publish an EN-US (English) file with USD prices for Operating Unit A; you then create a FR-FR (French) version of that catalog file, changing the pricing from USD to FRF, for Operating Unit A. In this example, Oracle iProcurement now has two price lists for Operating Unit A, one in USD and one in FRF, and the people in Operating Unit A see prices in those two currencies. If, however, you publish USD prices only for Operating Unit A and FRF prices only for Operating Unit B, then people in those operating units see only their prices. Price list currencies are independent of language.

The system uses the language code specified in your file to determine the decimal separator in a number. For example, if you specify American English (EN-US) in the file, the system interprets periods as decimal separators. If you specify German (DE-DE) in the file, the system interprets commas as decimal separators. The following table shows some examples:

Example Prices and Languages

Language in Bulk Load File	Price in Bulk Load File	Displayed Price when <i>ICX: Numeric characters</i> is 10,000.00	Displayed Price when <i>ICX: Numeric characters</i> is 10.000,00
EN-US	2,000	2,000.00	2.000,00
DE-DE	2,000	2.00	2,00
EN-US	10000.00	10,000.00	10.000,00
DE-DE	10000.00	1,000,000.00	1.000.000,00
EN-US	1.2,5	This price is rejected by the bulk loader, because EN-US does not expect a comma as a decimal separator.	This price is rejected by the bulk loader, because EN-US does not expect a comma as a decimal separator.
DE-DE	1.2,5	12.50	12,50
DE-DE	1,2.5	This price is rejected by the bulk loader, because DE-DE does not expect a period as a decimal separator.	This price is rejected by the bulk loader, because DE-DE does not expect a period as a decimal separator.
EN-US	1,29	129.00	129,00
DE-DE	1,29	1.29	1,29

Note: Decimal separators are influenced by the profile option *ICX: Numeric characters* in Oracle Applications. If this profile option is set to use periods as decimal separators, then the decimal separator that requesters see is a period regardless of their language. The bulk loader uses the language code in the file to determine *where* the decimal separator is placed. The profile option determines *how* the price displays to requesters. (If the profile option *ICX: Numeric characters* is not set, Oracle iProcurement uses the `nls_numeric_parameters` database setting to determine how to display the price.)

Example 14: Translating an XML File

In this example, Supplier Item number MW9001 created in XML Example 6 will be translated to Spanish.

```

<?xml version="1.0" encoding="ISO-8859-1" ?> <!-- version and
character set encoding information-->
<CATALOG xml:lang="ES-ES"> <!--language identification-->
  <ADMIN> <!--start of administrative section-->
    <NAME>Material de Oficina</NAME>
    <INFORMATION>
      <DATE>30-MAR-2003</DATE>
      <SOURCE>Acme</SOURCE>
    </INFORMATION>
  </ADMIN>

  <DATA> <!--start of catalog data section-->
    <ITEM ACTION="SYNC"> <!--Action must be SYNC -->
      <OWNER>
        <KEY>BALL_POINT_PENS</KEY> <!--key is non-translatable (same
in all languages)-->
        <NAME>Bolígrafos</NAME>
      </OWNER>
      <NAMEVALUE>
        <NAME>SUPPLIER_PART_NUM</NAME>
        <VALUE>MW9001</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>SUPPLIER</NAME>
        <VALUE>Acme</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>DESCRIPTION</NAME>
        <VALUE>Tinta azul, punta fina</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>TYPE</NAME> <!--key for the local descriptor Type-->
        <VALUE>Punta fina</VALUE>
      </NAMEVALUE>
      <NAMEVALUE>
        <NAME>INK_COLOR</NAME> <!--key for the local descriptor Ink C
olor-->
        <VALUE>Azul</VALUE>
      </NAMEVALUE>
    </ITEM>
  </DATA>
</CATALOG>

```

Backwards Compatibility

The release of Oracle iProcurement Patchset I introduced two XML loaders—one for loading schema and the other for loading data. However, in previous releases of Oracle iProcurement, only one loader was used for both schema and data. To support catalog files that were created for earlier releases of Oracle iProcurement where the schema and data coexisted in a single file, both of the new loaders have been modified. These modifications eliminate any need to manually manipulate the catalog files.

When a catalog file is submitted through the Upload Items button, the Schema and Hierarchy sections are ignored. When a catalog file is submitted through the Upload Schema button, the Contracts, Root_Descriptors and Data sections are ignored.

To successfully load a catalog that was created in an older release of Oracle iProcurement, perform the following steps:

1. Click the Upload Schema button on the **Loader Jobs** page to load the catalog schema that is in the file.
2. Click the Upload Items button on the **Loader Jobs** page to load the catalog data that is in the file.

Please refer to the information on loading schema, including the validations of the Schema and Hierarchy sections.

Using XML to Load Catalog Schema

This appendix explains how to create and load your catalog schema (categories, descriptors, and category hierarchy) into Oracle iProcurement's catalog using the XML loader.

This appendix covers the following topics:

- Introduction
- Introduction to the Catalog Structure
- Using XML to Load the Catalog Schema
- Version and Character Set Encoding
- Language Identification
- Administrative Section
- Schema Section
- Required and Validated Category Information
- Required and Validated Descriptors Information
- Hierarchy Section
- Reviewing and Saving Your XML File
- Loading Your XML File
- Resolving Errors
- Handling Special Characters
- Translating Catalog Schema
- Backwards Compatibility

Introduction

The descriptors, categories, and their relationships that you upload will display to Oracle iProcurement users when they search the catalog. The XML file that is used to load this information into Oracle iProcurement can be generated in a text editor, commercial XML generator program, or an XML generator program that you write yourself.

You can use any combination of online editing and XML files to maintain your catalog structure. You are not restricted to using one method or the other. For example, if you

load your initial categories and descriptors using XML, you can add to or change them using the Online Schema Maintenance pages in the eContent Manager.

This document is also available as a downloadable Readme file from the **Download Instructions and Templates** page in the eContent Manager (when you log in with the iProcurement Catalog Administration responsibility). For subsequent releases of Oracle iProcurement, always check the Readme file in the eContent Manager for the latest information.

Introduction to the Catalog Structure

At a high level, there are two areas that define the catalog—the catalog data and the catalog schema.

Catalog data consists of the items and services available for purchase. The associated prices for these items and services are also considered part of the catalog data.

Catalog schema is comprised of a combination of categories, local descriptors (sometimes known as category attributes) used to describe items in a specific category, and base descriptors (sometimes known as base attributes) used to describe any item or service in the catalog.

There are two types of categories in the catalog. Together, these categories define the hierarchy:

- Item categories, also known as genus categories, are used to group similar items. Item categories are found at the lowest level of the category hierarchy; therefore an item category can never be a parent category to a child category. Every item in the catalog must belong to an item category.
- Browsing categories, also known as navigation categories (or master or intermediate level categories), are used to define the levels of the category hierarchy. These types of categories can be either a parent or child to another category, but cannot contain any items.

Local descriptors apply only to items within a specific item category. Ink Color is an example of a local descriptor for the item category Ball Point Pens. Local descriptors can vary from one item category to another, and they are always optional.

Base descriptors apply to all items or services in the catalog. Supplier is an example of a base descriptor. Some base descriptors, such as Supplier Item number, are required; others, such as Manufacturer, are optional.

Using XML to Load the Catalog Schema

Catalog schema loaded into the catalog is divided into three main sections:

1. Admin (required): Used to identify the catalog.
2. Schema (optional): Used to define categories, local descriptors, and base descriptors.
3. Hierarchy (optional): Used to define category relationships, also known as the category hierarchy.

Your XML file can consist of just categories, just descriptors, just relationships, or any combination of the three. Categories and descriptors must be defined first (in any order), then hierarchy relationships.

There are two additional sections, `Root_Descriptors` and `Data`, that are used solely for supporting catalog files created for previous releases of Oracle iProcurement. New catalog files should not contain these two sections. For more information, see: *Backwards Compatibility*, page C-29.

The Catalog Schema Document Type Definition (DTD)

A Document Type Definition (DTD) is a formal definition, or summary, of the requirements of a particular XML file. This DTD will help you structure your XML file. However, you can also use the example XML files in this document to help you create your XML file.

Your XML file must conform to the following World Wide Web Consortium (W3C) specifications:

- The W3C recommendation for Extensible Markup Language (XML) 1.0 at <http://www.w3.org/TR/2000/REC-xml-20001006>.
- The W3C proposed recommendation for Namespaces in XML at <http://www.w3.org/TR/1999/REC-xml-names-19990114>.
- The `xml:lang` attribute as described in Language Identification.

The Catalog Schema DTD is provided in the Zip resources download. The DTD also exists in the `$OA_HTML` directory (or corresponding directory based on your platform). The DTD file name is `CatalogSchema.dtd`.

Version and Character Set Encoding

Every XML file must contain a line that indicates the version of XML you are using and any special encoding (or character set) you are using within the file. The version should always be 1.0. If your item descriptions and other catalog data use basic alphanumeric characters (a-z, AZ, 0-9, or any character with an ASCII code between 0 and 127), or if you used a UTF-8 editor to edit the file, you do not need to specify the encoding, so the beginning of your XML file can look like this:

```
<?xml version="1.0" ?>
```

When no document encoding is specified, UTF-8 is assumed.

If you are not using a UTF-8 editor and your catalog content includes special characters (such as the copyright or registered trademark symbols), accented characters (for example, é), or any characters that have a binary representation greater than 127, you must specify the character set in which your editor saves the file. For example, if you are creating the file in Spanish, using an ISO-8859-1 editor that supports Spanish characters, then you should also enter an encoding of ISO-8859-1 in your XML file, as follows:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
```

The system uses the encoding you specify in your XML file to "read" the contents of the file. If this encoding does not support the characters in the file nor matches the encoding in which the file was saved, the system produces an error and rejects the file with a Failed status.

Specify the encoding using the Internet Assigned Numbers Authority (IANA) registered character set names. A list of registered character sets is available from IANA at the following URL: <http://www.iana.org/assignments/character-sets>.

Language Identification

The XML documents that you submit must support language specifications using the `xml:lang` attribute as described in the Extensible Markup Language (XML) 1.0 W3C recommendation (visit <http://www.w3.org/TR> for all published and draft recommendations).

The following, extracted from the XML 1.0 specification, describes how language is identified.

- LanguageID ::= Langcode (- Subcode)*
LangCode ::= ISO639Code

According to the specification, the Langcode must be a two-letter language code as defined by ISO 639, Codes for the representation of the names of languages. The Subcode must be a country code from ISO 3166, Codes for the representation of names of countries. (See the list of language and territory codes in the table below.)

For example, the following illustrates setting the language to English and the country to the United States:

```
<CATALOG xml:lang="EN-US">
```

The language you specify must be installed in the Oracle iProcurement database. For more information on providing translations for catalog content, see: *Translating Catalog Schema*, page C-27.

The Oracle iProcurement catalog supports the following language code and territory code combinations, if the corresponding language is installed:

Valid Language and Territory Codes

Language	Language Code	Territory Code
American English	EN	US
Arabic	AR	AE
Brazilian Portuguese	PT	BR
British English	EN	GB
Bulgarian	BG	BG
Canadian French	FR	CA
Catalan	CA	CT
Croatian	HR	YU
Czech	CZ	CZ

Language	Language Code	Territory Code
Danish	DA	DK
Dutch	NL	NL
Egyptian	EG	EG
Finnish	FI	FI
French	FR	FR
German	DE	DE
Greek	EL	GR
Hebrew	IW	IL
Hungarian	HU	HU
Icelandic	IS	IS
Italian	IT	IT
Japanese	JA	JP
Korean	KO	KR
Latin American Spanish	ES	MX
Lithuanian	LT	LT
Norwegian	NO	NO
Polish	PL	PL
Portuguese	PT	PT
Romanian	RO	RO
Russian	RU	SU
Simplified Chinese	ZH	CN
Slovak	SK	SI
Slovenian	SL	SI
Spanish	ES	ES
Swedish	SV	SE
Thai	TH	TH

Language	Language Code	Territory Code
Traditional Chinese	ZH	TW
Turkish	TR	TR

Administrative Section

This section is required and is used to identify the catalog.

Required and Validated Administrative Information

The following table describes the required administrative section fields:

Note: The maximum byte lengths given in this document are not necessarily the same as character lengths. For example, 700 Japanese characters will typically be longer than 700 bytes, and a special symbol (though it is a single character), may be more than one byte. Therefore, the actual, byte limits are given below. How these translate to character limits depends on the language and characters you are using and how the database administrator has configured the database character set.

Administration Section Fields

Tag	Required?	Default Value	Description and Validation
<NAME>	Required	(No default)	Name used to identify your file, for your own purposes. There is no validation performed on this value. The limit is 250 bytes.
<DATE>	Required	(No default)	Date of creation or modification. Use a date format of your choice; there is no validation performed on this value.
<SOURCE>	Required	(No default)	Author of the XML document. Can be a person, company, or tool. There is no validation performed on this value.

XML Example 1: Entering Administrative Information

```
<ADMIN>
  <NAME>Vision Operations</NAME>
  <INFORMATION>
    <DATE>08-DEC-2003</DATE>
    <SOURCE>Acme</SOURCE>
  </INFORMATION>
</ADMIN>
```

XML Example 2: Entering Administrative Information <ADMIN>

```
<ADMIN>
<NAME>Vision Operations</NAME>
<INFORMATION>
  <SOURCE>Acme</SOURCE> <!--SOURCE and DATE are interchangeable-->
  <DATE>08-DEC-2003</DATE>
</INFORMATION>
</ADMIN>
```

Schema Section

The schema section is optional and contains one or many category or descriptor sections.

The category section is used to define both item and browsing categories. While the relationships between these types of categories are established in the hierarchy section of the XML file, some of the actions that can be performed in the category section affect the hierarchy. For example, if a browsing category is deleted through the schema section, all of its child categories will be disconnected from the hierarchy. (See XML Example 11: Deleting a Browsing Category, page C-24.)

The descriptors section is used to define base and local descriptors. For example, you can use tags to specify whether the descriptor is searchable or visible when viewing item details. If these tags are not included in an XML file, the defaults will be applied to the descriptor. (See Default Base Descriptors, page C-13.)

Categories and descriptors may be maintained using the action commands ADD, UPDATE, SYNC, or DELETE. Action commands ADD and UPDATE are internally converted to SYNC. The SYNC action adds the specified category or descriptor if it is new and updates it if it already exists.

To determine whether to add or update a category when you use SYNC, Oracle iProcurement matches the category KEY. When the category KEY in your XML file matches the category KEY in the catalog, the category in the catalog is updated with the information provided in your XML file. Otherwise, the category is added to the catalog.

To determine whether to add or update a descriptor when you use SYNC, Oracle iProcurement matches the descriptor KEY and the OWNER name or key. When the KEY and OWNER in your XML file match the KEY and OWNER in the catalog, the descriptor in the catalog is updated with the information provided in your XML file. Otherwise, the descriptor is added to the catalog.

Note: Using the schema bulk load file, you cannot use the action command DELETE to delete an item category if it contains items. You must first remove the items, either by deleting them or moving them to a new category, before you can delete the category. (Online, using the

Item Categories schema maintenance page, you can delete categories that contain items.)

Note: You cannot delete the default base descriptors that Oracle iProcurement provides. (See: Default Base Descriptors, page C-13.)

Note: If you delete a descriptor, you are also deleting that information from the items themselves in the catalog. For example, if you delete the Ink Color descriptor from the category Pens, all items in that category will no longer display the ink color. If you delete a base descriptor, all items in the catalog will no longer display that descriptor. If you delete a descriptor and want to add it back, you can use the same name and key (if you want). Note that adding back a descriptor does not add back its values. For example, once you delete Ink Color, the values for Ink Color (such as blue or black) do not return when you add Ink Color back.

The Oracle iProcurement catalog supports the following:

- A maximum of 150 local descriptors per category, no more than 50 per type: 50 Text descriptors, 50 Translatable Text descriptors, and 50 Number descriptors.
- A maximum of 300 total base descriptors, no more than 100 per Text, Translatable Text, or Number types.
- Any number of item and browsing categories.

Required and Validated Category Information

The following table describes the category section fields:

Category Fields

Tag	Required?	Default Value	Description and Validation	Size (in Bytes)
<KEY>	Required	(No default)	Internal identifier for the category. They key must be unique. You cannot change the key once it is specified. The key can be the same as the NAME, and can contain spaces.	250
<NAME>	Required when creating a new category	(No default)	Name of the category that displays to users of Oracle iProcurement. It must be unique.	250
<TYPE>	Optional	GENUS	To specify the category as a browsing category, use the type NAVIGATION. To specify the category as an item category, use the type GENUS. You cannot change the type once it is specified.	—
<DESCRIPTION>	Optional	(No default)	Description of the category, for your own purposes (does not display to requesters online).	700

Remember that new categories you create must be mapped to categories in Oracle Applications to successfully create requisitions for items in that category. See the online Help in the eContent Manager (accessible through the iProcurement Catalog Administration responsibility) for more information on mapping.

Required and Validated Descriptors Information

The following table describes the descriptors section fields:

Descriptor Fields

Tag	Required?	Description and Validation	Size (in Bytes)
<KEY>	Required	Internal identifier for the descriptor. The key must be unique. You cannot change the key once it is specified. The key can be the same as the NAME, and can contain spaces. <i>Default value:</i> (No default)	250
<NAME>	Required when creating a new descriptor	Name of the descriptor that displays to users of Oracle iProcurement. For local descriptors, the name must be unique within its category (<OWNER>) and must not be the same as a base descriptor name. For base descriptors, the name must be unique within the catalog. <i>Default value:</i> (No default)	250
<OWNER><KEY>	Optional	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. When defining local descriptors, the owner is the category. If no owner is specified, or if you specify 0, the descriptor will be created as a base descriptor. <i>Default value:</i> 0	250
<OWNER><NAME>	Optional	The owner is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. <i>Default value:</i> Root Category	250

Tag	Required?	Description and Validation	Size (in Bytes)
<TYPE>	Optional	<p>Data type for the descriptor:</p> <p>Text: numbers or text that display the same in all languages and cannot be translated.</p> <p>Translatable Text: numbers or text that can vary by language, if you translate them.</p> <p>Number: positive or negative number, with or without decimals.</p> <p>You cannot update the type once it is specified.</p> <p><i>Default value:</i> Translatable Text</p>	—
<DESCRIPTION>	Optional	<p>Description of the descriptor, for your own purposes (does not display online).</p> <p><i>Default value:</i>(No default)</p>	700
<SEARCHRESULTS_VISIBLE>	Optional	<p>Indicator of whether the descriptor displays in the search results. Valid values are 0 (for No) or 1 (for Yes). Local descriptors are displayed to requesters only when accessed by browsing categories online.</p> <p>Note: After the following descriptors, only the first 11 search results visible descriptors in the sequence display in the search results, for space considerations: Thumbnail Image, Description, Long Description, Unit, Unit Price, Currency, Functional Currency Price, and Functional Currency (and Category).</p> <p><i>Default value:</i>0</p>	—

Tag	Required?	Description and Validation	Size (in Bytes)
<SEQUENCE>	Optional	<p>If the descriptor is displayed in the search results, the sequence number indicates the descriptor's display sequence on the Search Results Summary, Search Results, Item Detail, and Compare Item pages. Local descriptors are displayed to requesters only when accessed by browsing categories online. See: Default Base Descriptors, page C-13, for information on existing descriptor sequences. Do not use decimals in your sequence numbers. (You can reuse an existing sequence number, if you need to. The descriptor will display next to the one with the same number.)</p> <p><i>Default value:-1</i> (If you do not specify a sequence, Oracle iProcurement displays the descriptors after the default base descriptors that Oracle iProcurement provides.)</p>	—

Tag	Required?	Description and Validation	Size (in Bytes)
<SEARCHABLE>	Optional	Indicator of whether this descriptor will be searched by the search engine. Valid values are 0 (for No) or 1 (for Yes). <i>Default value:1</i>	—
<ITEMDETAILVISIBLE>	Optional	Indicator of whether you want this descriptor to display when someone in Oracle iProcurement views the details of an item or compares items. Valid values are 0 (for No) or 1 (for Yes). <i>Default value:1</i>	—

Tip: If you want to create a base descriptor, omit the OWNER. When OWNER is omitted, the catalog assumes you are creating a base descriptor.

Default Base Descriptors

The following table provides information on the default base descriptors that Oracle iProcurement provides and their default values. Some of the descriptors listed below are not used when bulk loading catalog items, yet are part of the descriptor sequence in Oracle iProcurement.

Default Descriptor Information (Sequenced View)

Descriptor	SEQUENCE	SEARCHRESULTS VISIBLE	ITEMDETAIL VISIBLE	SEARCHABLE
Thumbnail Image	1 *	1 (Yes)	1 (Yes, on the Compare Items page)	0 (No) *
Description	2	1 (Yes)	1 (Yes)	1 (Yes)
Supplier	3	1 (Yes)	1 (Yes)	1 (Yes)
Supplier Site	4	1 (Yes)	1 (Yes)	0 (No) *
Supplier Item	5	1 (Yes)	1 (Yes)	1 (Yes)
Supplier Part Auxiliary ID	6	0 (No)	1 (Yes)	1 (Yes)
Internal Item Number ⁺	7	1 (Yes)	1 (Yes)	1 (Yes)

Descriptor	SEQUENCE	SEARCHRESULTS VISIBLE	SITEMDETAIL VISIBLE	SEARCHABLE
Image	7	0 (No) *	1 (Yes)	0 (No) *
Manufacturer	8	0 (No)	1 (Yes)	1 (Yes)
Manufacturer Item	9	0 (No)	1 (Yes)	1 (Yes)
Unit	10	1 (Yes)	1 (Yes)	0 (No) *
Unit Price	11	1 (Yes)	1 (Yes)	0 (No) *
Currency	12	1 (Yes)	1 (Yes)	0 (No) *
Functional Currency Price +	13	1 (Yes)	1 (Yes)	0 (No) *
Functional Currency +	14	1 (Yes)	1 (Yes)	0 (No) *
Availability	15	0 (No)	1 (Yes)	0 (No)
Lead Time	16	0 (No)	1 (Yes)	0 (No) *
UNSPSC Code	17	0 (No)	1 (Yes)	1 (Yes)
Item Type	18	0 (No)	1 (Yes)	0 (No)
Operating Unit (Buyer)	19	0 (No) *	0 (No) *	0 (No) *
Contract Number	20	0 (No)	1 (Yes)	0 (No) *
Contract Line	21	0 (No)	0 (No)	0 (No) *
Pricelist	22	0 (No) *	0 (No) *	0 (No) *
Alias	23	0 (No)	0 (No)	1 (Yes)
Comments	24	0 (No)	0 (No)	0 (No)
Long Description	25	1 (Yes)	1 (Yes)	0 (No)
Attachment URL	26	0 (No) *	1 (Yes)	0 (No) *
Supplier URL	27	0 (No)	1 (Yes)	0 (No) *
Manufacturer URL	28	0 (No)	1 (Yes)	0 (No) *
Image URL	30	0 (No) *	0 (No)	0 (No) *

* You should not modify these properties.

+ Although you can change some of the properties for these descriptors, you cannot add or update values for them when bulk loading items.

The following table shows the same information as the previous table, **Default Descriptor Information (Sequenced View)**, isolating descriptors that are SEARCHRESULTSVISIBLE by default:

Default Descriptor Information (Visible in Search Results)

Descriptor	SEQUENCE
Thumbnail Image	1
Description	2
Supplier	3
Supplier Site	4
Supplier Item	5
Internal Item Number	7
Unit *	10
Unit Price	11
Currency	12
Functional Currency Price *	13
Functional Currency *	14
Long Description *	25

* The order in which these are displayed in the search results cannot be controlled by the sequence number.

The following table shows the same information as the table earlier above, **Default Descriptor Information (Sequenced View)**, isolating descriptors that are ITEMDETAILVISIBLE by default:

Default Descriptor Information (Visible in Item Details and Comparisons)

Descriptor	SEQUENCE
Thumbnail Image *	1
Description *	2
Supplier	3
Supplier Site	4
Supplier Item	5
Supplier Part Auxiliary ID	6
Internal Item Number	7
Image *	7
Manufacturer	8
Manufacturer Item	9
Unit	10
Unit Price	11
Currency	12
Functional Currency Price	13
Functional Currency	14
Availability	15
Lead Time	16
UNSPSC Code	17
Item Type	18
Contract Number	20
Long Description	25
Attachment URL *	26
Supplier URL *	27
Manufacturer URL *	28

* The order in which these are displayed in the item details and comparisons pages cannot be controlled by the sequence number.

The item category is always displayed in the search results and item details.

If any of the following descriptors are set to be not searchable, they still display on the **Advanced Search** page; however, requesters will see an error message when selecting the descriptor, saying they cannot search on it:

- Description
- Supplier Item
- Supplier
- Category
- Manufacturer
- Manufacturer Item
- UNSPSC Code
- Supplier Part Auxiliary ID
- Internal Part Number

XML Example 3: Creating Item Categories and Local Descriptors

In this example, two item categories, Envelopes and Pens, will be added to the catalog. In addition, local descriptors will be defined for both item categories.

```
<?xml version="1.0" ?> <!--version and character set
encoding information-->
<CATALOG xml:lang="EN-US"> <!--language identification-->
<ADMIN> <!--start of administrative section-->
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>09-DEC-2003</DATE>
  </INFORMATION>
</ADMIN> <!--end of administrative section-->

<SCHEMA> <!--start of schema section-->
  <CATEGORY ACTION="SYNC"> <!--start of category section for first
category-->
    <KEY>44.12.15.06.00</KEY>
    <NAME>Envelopes</NAME>
    <TYPE>GENUS</TYPE><!--type determines if category is browsing or
item-->
  </CATEGORY><!--end of category section for category Envelopes-->

  <DESCRIPTOR ACTION="SYNC"><!--start of descriptor section
for category Envelopes-->
    <KEY>SIZE</KEY>
    <NAME>Size</NAME>
    <OWNER>
      <KEY>44.12.15.06.00</KEY>
      <NAME>Envelopes</NAME>
    </OWNER>
    <DESCRIPTION>Letter or Legal Size</DESCRIPTION> <!--description
is optional, for your own purposes-->
  </DESCRIPTOR> <!--end of descriptor section-->
```

```

    <CATEGORY ACTION="SYNC">  <!--start of category section
for second category-->
    <KEY>44.12.17.04</KEY>
    <NAME>Pens</NAME>
    <TYPE>GENUS</TYPE>  <!--type determines if category is browsing
or item-->
</CATEGORY>  <!--end of category section for category Pens-->

    <DESCRIPTOR ACTION="SYNC">  <!--start of descriptor
section for category Pens-->
    <KEY>INK_COLOR</KEY>
    <NAME>Ink Color</NAME>
    <OWNER>
    <KEY>44.12.17.04</KEY>
    <NAME>Pens</NAME>
    </OWNER>
</DESCRIPTOR>  <!--end of descriptor section for descriptor Ink Co
lor-->

    <DESCRIPTOR ACTION="SYNC">  <!--start of descriptor
section for category Pens-->
    <KEY>LENGTH</KEY>
    <NAME>Length (CM)</NAME>
    <OWNER>
    <KEY>44.12.17.04</KEY>
    <NAME>Pens</NAME>
    </OWNER>
    <TYPE>Number</TYPE>
    <DESCRIPTION>Length of the pen</DESCRIPTION>  <!--description
is optional, for your own purposes-->
    <SEARCHABLE>No</SEARCHABLE>
    </DESCRIPTOR>  <!--end of descriptor section for descriptor Leng
th (CM)-->

</SCHEMA>  <!--end of schema section-->
</CATALOG>  <!--end of catalog-->

```

XML Example 4: Deleting an Item Category and Local Descriptor

In this example, the item category Envelopes and the local descriptor Ink Color for the category Pens (created in XML Example 3) will be deleted.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>  <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
    <SOURCE>Acme</SOURCE>
    <DATE>09-DEC-2003</DATE>
    </INFORMATION>
</ADMIN>  <!--end of administrative section-->

```

```

<SCHEMA>  <!--start of schema section-->
  <CATEGORY ACTION="DELETE">  <!--start of category section,
dele
ting Envelopes-->
  <KEY>44.12.15.06.00</KEY>
  <NAME>Envelopes</NAME>
  <TYPE>GENUS</TYPE>
</CATEGORY>  <!--end of category section-->
  <DESCRIPTOR ACTION="DELETE">  <!--start of descriptor
section, deleting Ink Color-->
  <KEY>INK_COLOR</KEY>
  <OWNER>
  <KEY>44.12.17.04</KEY>
  </OWNER>
  </DESCRIPTOR>  <!--end of descriptor section for descriptor Ink
Color-->
</SCHEMA>

</CATALOG>

```

XML Example 5: Creating a Base Descriptor

In this example, two base descriptors, Country of Origin and Shipping Cost, are added to the catalog.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
<ADMIN>
  <NAME>General Office Supplies Catalog</NAME>
  <INFORMATION>
  <SOURCE>Acme</SOURCE>
  <DATE>08-DEC-2003</DATE>
  </INFORMATION>
</ADMIN>

<SCHEMA>
<DESCRIPTOR ACTION="SYNC">  <!--start of first base descriptor-->
  <KEY>Country of Origin</KEY>
  <NAME>Country of Origin</NAME>
  <OWNER>
  <KEY>0</KEY>  <!--key must be 0 when defining a base descript
or-->
  </OWNER>
  </DESCRIPTOR>

  <DESCRIPTOR ACTION="SYNC">  <!--start of second base
descriptor-->
  <KEY>Shipping Cost</KEY>
  <NAME>Shipping Cost</NAME>
  <OWNER>
  <KEY>0</KEY>
  </OWNER>
  <TYPE>Number</TYPE>
  </DESCRIPTOR>

</SCHEMA>
</CATALOG>

```

XML Example 6: Updating a Base Descriptor

In this example, the name for the base descriptor Shipping Cost created in XML Example 5 will be updated.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN>

  <SCHEMA>
    <DESCRIPTOR ACTION="SYNC">
      <KEY>SHIPPING COST</KEY>  <!--key is case insensitive-->
      <NAME>SHIPPING COST</NAME>  <!--name changed to upper case-->
      <OWNER>
        <KEY>0</KEY>
      </OWNER>
    </DESCRIPTOR>

  </SCHEMA>
</CATALOG>
```

XML Example 7: Deleting a Base Descriptor

In this example, the base descriptor Shipping Cost created in XML Example 5 will be deleted.

Note: Use caution when deleting base descriptors, since deleting base descriptors may cause unrecoverable data loss. All items will lose the information provided by the base descriptors you delete.

```
<?xml version="1.0" ?>
  <CATALOG xml:lang="EN-US">
    <ADMIN>
      <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN>
  <SCHEMA>
    <DESCRIPTOR ACTION="DELETE">  <!--start of deleting descriptor-->
  >
    <KEY>Shipping Cost</KEY>
    <NAME>Shipping Cost</NAME>
    <OWNER>
      <KEY>0</KEY>  <!--key must be 0 when specifying a base descri
ptor-->
    </OWNER>
  </DESCRIPTOR>

  </SCHEMA>
```


</CATALOG>

Hierarchy Section

The hierarchy section is optional. Use the hierarchy section for displaying a hierarchy of categories that requesters can browse online.

You can also manage the category hierarchy online in Oracle iProcurement, in the eContent Manager, to perform the same actions as the hierarchy section.

If you do not create a category hierarchy, the categories will exist by themselves. This means that requesters will not be able to browse the categories online, but will be able to find the items when performing a search.

The category hierarchy may contain multiple levels depending on the number of browsing categories assigned to the tree. At the lowest level of the tree will be the item categories. You do not have to have the same number of levels between categories. One category can contain subcategories, which contain item categories; another can contain only item categories. When creating the category hierarchy, keep in mind that categories that contain items can never become parent categories.

Maintain the category hierarchy using the action commands SYNC and DELETE.

The SYNC action adds or updates the hierarchy relationship specified in the file. (See the examples below.)

The following table describes the required hierarchy section fields:

Hierarchy Fields

Tag	Required?	Default Value	Description and Validation
<PARENT>	Required	(No default)	Specifies the parent category. The parent is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. If you specify both, the HIERARCHY section requires the <KEY> tag to appear before the <NAME> tag.
<CHILD>	Required	(No default)	Specifies the child category. The child is defined by either the name (using the <NAME> tag) or key (using the <KEY> tag) or both. If you specify both, the HIERARCHY section requires the <KEY> tag to appear before the <NAME> tag.

XML Example 8: Creating a Category Hierarchy

In this example, the browsing category Office Supplies is created, and the item categories Pens and Envelopes created in XML Example 3 are added as child categories to Office Supplies.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN>

  <SCHEMA>
    <CATEGORY ACTION="SYNC"> <!--start of category section-->
      <KEY>OFFICE_SUPPLIES</KEY>
      <NAME>Office Supplies</NAME>
      <TYPE>NAVIGATION</TYPE> <!--type specifies a browsing category
-->
      <DESCRIPTION>Office Supplies</DESCRIPTION>
      </CATEGORY> <!--end of category section-->
    </SCHEMA> <!--end of schema section-->
  <HIERARCHY> <!--start of the hierarchy section-->
    <RELATIONSHIP ACTION="SYNC">
      <PARENT>
        <NAME>Office Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.17.04</KEY> <!--Pens is defined as the child of O
ffice Supplies-->
      </CHILD>
    </RELATIONSHIP>
    <RELATIONSHIP ACTION="SYNC">
      <PARENT>
        <NAME>Office Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.15.06.00</KEY> <!--Envelopes is defined as the ch
ild of Office Supplies-->
      </CHILD>
    </RELATIONSHIP> <!--end of relationship section-->
  </HIERARCHY> <!--end of hierarchy section-->
</CATALOG> <!--end of catalog-->
```

XML Example 9: Deleting a Parent-Child Relationship

In this example, the item category Pens (with the key 44.12.17.04) will be removed from its parent, Office Supplies. The category Pens and all of its contents will not be deleted from the catalog—people will still be able to search for the category and its items. The category Pens is no longer visible while browsing the categories, since it has been removed from the hierarchy.

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN>
  <HIERARCHY>
    <RELATIONSHIP ACTION="DELETE">
      <PARENT>
        <NAME>Office Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.17.04</KEY>
      </CHILD>
    </RELATIONSHIP>
  </HIERARCHY>
</CATALOG>

```

XML Example 10: Changing a Parent-Child Relationship

In this example, the categories previously added to Office Supplies in XML Example 8 are moved to a new category, Desk Supplies.

Note: This example assumes that the browsing category Desk Supplies has already been created.

To move a category to another category, first delete it from its current parent category, using the DELETE action, then add it to its new parent category using SYNC:

```

<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN>
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN>

  <HIERARCHY>  <!--start of the hierarchy section-->
    <RELATIONSHIP ACTION="DELETE">
      <PARENT>
        <NAME>Office Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.17.04</KEY>  <!--Pens category is removed from Off
ice Supplies-->
      </CHILD>
    </RELATIONSHIP>
    <RELATIONSHIP ACTION="DELETE">
      <PARENT>
        <NAME>Office Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.15.06.00</KEY> <!--Envelopes category is removed fr
om Office Supplies-->
      </CHILD>
    </RELATIONSHIP>  <!--end of relationship section-->
    <RELATIONSHIP ACTION="SYNC">
      <PARENT>
        <NAME>Desk Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.17.04</KEY>  <!--Pens is moved to Desk Supplies-->
      </CHILD>
    </RELATIONSHIP>
    <RELATIONSHIP ACTION="SYNC">
      <PARENT>
        <NAME>Desk Supplies</NAME>
      </PARENT>
      <CHILD>
        <KEY>44.12.15.06.00</KEY>  <!--Envelopes is moved to Desk Sup
plies-->
      </CHILD>
    </RELATIONSHIP>  <!--end of relationship section-->
  </HIERARCHY>
</CATALOG>

```

XML Example 11: Deleting a Browsing Category

For this example, assume the following category hierarchy:

```

Office Supplies  <--browsing category-->
  Storage        <--browsing category-->
    Shelving     <--item category-->
    Boxes        <--item category-->

```

The following example deletes the browsing category Storage. Deleting the browsing category Storage also disconnects the item categories Shelving and Boxes from the hierarchy. The categories Shelving and Boxes themselves are not deleted, they are just no longer visible in the hierarchy when you delete their parent category, Storage.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="EN-US">
  <ADMIN> <!--start of administrative section-->
    <NAME>General Office Supplies Catalog</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>09-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN> <!--end of administrative section-->
  <SCHEMA>
    <CATEGORY ACTION="DELETE"> <!--delete browsing category-->
      <KEY>OFFICE_STORAGE</KEY>
      <NAME>Storage</NAME>
      <TYPE>NAVIGATION</TYPE>
    </CATEGORY>

    </SCHEMA>
  </CATALOG>
```

Reviewing and Saving Your XML File

See the tables in the previous sections to be sure that the information in your XML file will validate successfully. Make sure your XML file is formatted properly according to the DTD and examples in this document.

Note: Open the completed XML file in Internet Explorer to check for syntax errors in the file. (Internet Explorer does not validate the document against the DTD, but checks for syntax errors such as a missing </ADMIN> at the end of the ADMIN section.) If the file's syntax is correct, it opens successfully in Internet Explorer. Otherwise, Internet Explorer presents an error.

Save your XML file with a .xml extension.

Loading Your XML File

Once you have created and reviewed your XML file, load it to Oracle iProcurement as follows:

1. Use the iProcurement Catalog Administration responsibility to access the eContent Manager home page.
2. Expand "Load Data & Schema" and click "Manage Loading" to open the **Loader Jobs** page.
3. On the **Loader Jobs** page, click Upload Schema.
4. Enter your File Name and path, or click Browse to navigate to your XML file.
5. Click Upload to send your file.

As soon as the load is started, the screen displays a confirmation message and job number.

To check the status of your job, return to the **Loader Jobs** page.

The **Loader Jobs** page tells you the status of your entire job:

- Pending (waiting to be processed)
- Running (processing the file)
- Completed
- Failed (did not load the file at all because of a format or encoding error, or loaded the file but rejected some of its lines)

Large files may take some time to load. You do not need to remain logged in while your job completes. If you need, click the Refresh or Reload button on your browser to update the status.

As an alternative to the **Loader Jobs** page, you can also view bulk load jobs in Oracle Applications:

1. In Oracle Applications, in the Oracle Purchasing or System Administration responsibilities, navigate to the View Requests window as follows:

From Oracle Purchasing: Requests

From System Administration: Requests > View

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

2. In the Find Requests window, choose to find all requests or enter a specific Request ID, Name, or other information.

The bulk load number assigned to your bulk load job in the eContent Manager is the same as the Request ID. The request name is Catalog Bulk Load - Catalog Structure.

The Requests window uses different status readings for its jobs. For example, a bulk load file with a status of Failed on the **Loader Jobs** page has a status of Completed - Warning in the Requests window.

3. You may be able to see more details about the bulk load and errors using the View Log button.

If you still cannot determine the cause of an error using the log, temporarily set the profile option *POR: Set Debug Catalog Loader ON* to Yes with Detail and bulk load the file again. Setting this profile option to Yes or Yes with Detail displays a more detailed log of the bulk load process for that job. (This profile option should be set to Yes or Yes with Detail only while troubleshooting.)

Resolving Errors

The **Loader Jobs** page alerts you to failures or validation errors in your XML file. Oracle iProcurement looks for errors in two phases: format errors and validation errors.

Format errors (failures)

Format errors occur when the XML file fails validation against the DTD. Some examples of format errors include special characters in your file that are not covered by the

character set specified in the `<?xml version="1.0" ?>` element, or a syntactic error such as forgetting to end the administrative section with `</ADMIN>`. If a format error is encountered, the load process stops, and a Failed status is returned.

If your job fails, fix the file and resubmit it for processing.

Validation errors (rejected lines)

Once format errors, if any, are resolved, Oracle iProcurement checks for validation errors. Validation errors occur when information that you entered in your XML file does not match corresponding information already held within Oracle iProcurement or Oracle Applications. For example, if you do not define a required attribute in your XML file, the entire category, descriptor, or relationship in which the error occurred will be rejected.

If your job contains rejected lines, click the Rejected Lines number for the job to view the errors. Fix the file and resubmit it for processing.

Handling Special Characters

If you want to include special characters (such as `&`, or `<>`) in your XML file, use the CDATA tag as follows:

```
<CATEGORY ACTION="SYNC">
  <KEY>Pens</KEY>
  <NAME><![CDATA[Felt & Ball Tip Pens <-- SPECIAL DEALS]]></NAME>
  <TYPE>GENUS</TYPE>
</CATEGORY>
```

Use the CDATA tag only for special characters that have meaning in XML. For example, the less-than character (`<`) has special meaning in XML. If you do not enclose it within CDATA tags, then the file fails XML processing. For accents or other language-specific characters, you must use the proper encoding. See Version and Character Set Encoding, page C-3.

Note: Do not use HTML code or character sequences, or Java scripts, in the bulk load file. For security reasons, Oracle Applications Framework (the technology upon which Oracle iProcurement is built) ignores these. For example, `Buy Now` displays as `Buy Now` in the catalog. The sequence `©` (instead of the copyright symbol) causes a format failure. (The following special character sequences are exceptions and do work, even without a CDATA tag: `&` for ampersand, `<` for less-than, and `>` for greater-than. For example, `&` displays as `&` in the catalog.)

Translating Catalog Schema

When you load a category or descriptor to the catalog, it is automatically loaded for all of the installed languages in the Oracle iProcurement database. Changes made to category relationships are also automatically reflected for all of the installed languages. To change the names or descriptions in another language, translate the XML file and load it again, specifying the supported language. When you delete a category or descriptor, it is deleted for all languages installed in the Oracle iProcurement database.

When you change a non-translatable attribute such as Searchable, or change the category hierarchy, the change is reflected for all of the languages installed in the Oracle iProcurement database. However, when you change a translatable attribute such as

Description or Name, it is updated only in the language specified at the beginning of the XML file.

The information that can be translated for categories and attributes are the NAME and DESCRIPTION. The KEY must be included in the XML file for validation purposes, but cannot be translated. Furthermore, since the KEY for a category or descriptor is non-translatable and non-editable, its value will never change from when the category or descriptor was first created.

The following table shows the values in the database for a category whose name has been translated to Spanish. Notice that the key remains constant.

Example Category Translation

Tag	EN-US	ES-ES
<NAME>	Ball Point Pens	Boligrafos
<KEY>	UNSPSC_44121704	UNSPSC_44121704

Note: If you do not specify attributes such as SEARCHRESULTSVISIBLE in your translated file, they revert to their default values in all languages. For example, you change the SEARCHRESULTSVISIBLE attribute for a descriptor. Later, you bulk load a file specifying a different language description for the descriptor, but you omit the SEARCHRESULTSVISIBLE tag. The descriptor reverts to the default SEARCHRESULTSVISIBLE value.

XML Example 12: Translating Categories and Descriptors

In this example, Office Supplies, Pens, and the two local descriptors for Pens are translated to Spanish. When users search the catalog in Spanish, they will see the names and descriptions of these categories and descriptors in Spanish.

```
<?xml version="1.0" ?>
<CATALOG xml:lang="ES-ES" <!--language information indicates dat
a is Spanish-->
  <ADMIN>
    <NAME>Vision Operations</NAME>
    <INFORMATION>
      <SOURCE>Acme</SOURCE>
      <DATE>08-DEC-2003</DATE>
    </INFORMATION>
  </ADMIN>
```



```

<SCHEMA> <!--start of schema section-->
  <CATEGORY ACTION="SYNC">
    <KEY>OFFICE_SUPPLIES</KEY>
    <NAME>Material de oficina</NAME> <!--category name Office Supp
lies is translated-->
    <TYPE>NAVIGATION</TYPE>
    <DESCRIPTION>Material de oficina</DESCRIPTION> <!--optional de
scription is translated-->
  </CATEGORY>
  <CATEGORY ACTION="SYNC">
    <KEY>44.12.17.04</KEY>
    <NAME>Boligrafos</NAME> <!--category name Pens is translated-->
    <TYPE>GENUS</TYPE>
  </CATEGORY>
  <DESCRIPTOR ACTION="SYNC">
    <KEY>INK_COLOR</KEY>
    <NAME>Color de tinta</NAME> <!--descriptor name Ink Color is tr
anslated-->
    <OWNER>
      <KEY>44.12.17.04</KEY>
    </OWNER>
  </DESCRIPTOR>
  <DESCRIPTOR ACTION="SYNC">
    <KEY>LENGTH</KEY>
    <NAME>Tamano de la recarga</NAME> <!--descriptor name Length i
s translated-->
    <OWNER>
      <KEY>44.12.17.04</KEY>
    </OWNER>
    <DESCRIPTION>Tamano de la recarga</DESCRIPTION> <!--optional d
escription is translated-->
    <SEARCHABLE>No</SEARCHABLE>
  </DESCRIPTOR>
</SCHEMA> <!--end of schema section-->
</CATALOG> <!--end of catalog-->

```

Backwards Compatibility

The release of Oracle iProcurement Patchset I introduced two XML loaders—one for loading schema and the other for loading data. However, in previous releases of Oracle iProcurement, only one loader was used for both schema and data. To support catalog files that were created for earlier releases of Oracle iProcurement where the schema and data coexisted in a single file, both of the new loaders have been modified. These modifications eliminate any need to manually manipulate the catalog files.

When a catalog file is submitted through the Upload Items button, the Schema and Hierarchy sections are ignored. When a catalog file is submitted through the Upload Schema button, the Root_Descriptors and Data sections are ignored.

To successfully load a catalog that was created in an older release of Oracle iProcurement, perform the following steps:

1. Click the Upload Schema button on the **Loader Jobs** page to load the catalog schema that is in the file.
2. Click the Upload Items button on the **Loader Jobs** page to load the catalog data that is in the file.

Please refer to the XML catalog load document for further information regarding uploading catalog items, including the validations of the Root_Descriptors and Data sections.

Search Engine Logic

This appendix describes the search engine in detail, including setup impact on searching.

This appendix covers the following topics:

- Search Methods
- Items Displayed in Search Results
- Related Links
- Filtering and Sorting
- Supported Search Methods by Catalog Type
- Special Characters
- Search Configuration
- Relevance Ranking
- Technical Details
- Searching in Other Languages

Search Methods

The basic search methods are as follows:

- Standard (or quick) search
- Expanded search
- Advanced search

For standard and advanced search, the search engine returns items that exactly match the keyword. For example, searching for *AB* does not return item number *AB22ZL*. Searching for *pen* does not return *pens*. You must use wildcards (such as *AB%*) to perform a partial match.

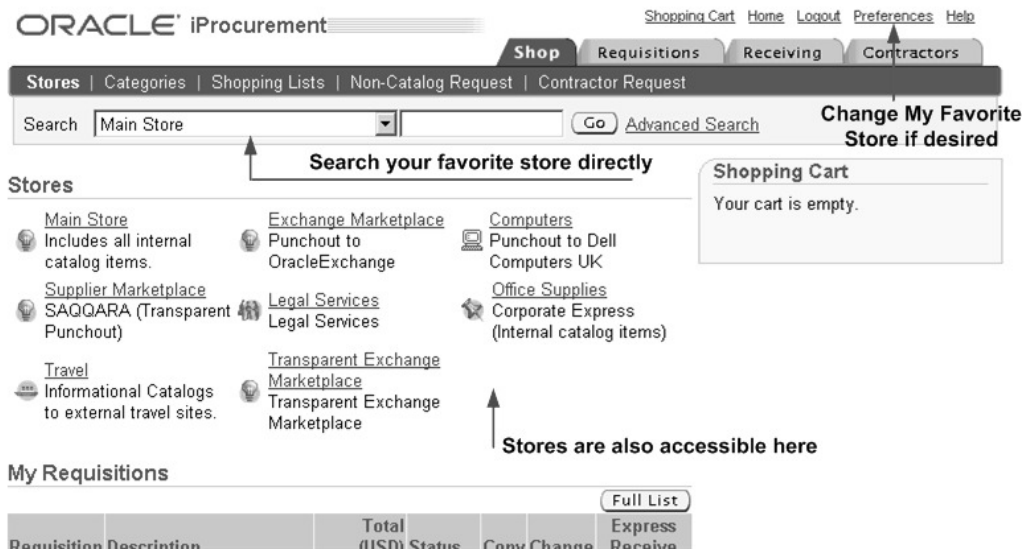
Searching is case insensitive. For example, entering *ab22zl* in the Search field finds *AB22ZL*.

You can also filter and sort search results, and view categories and shopping lists that match your search criteria.

Standard Search

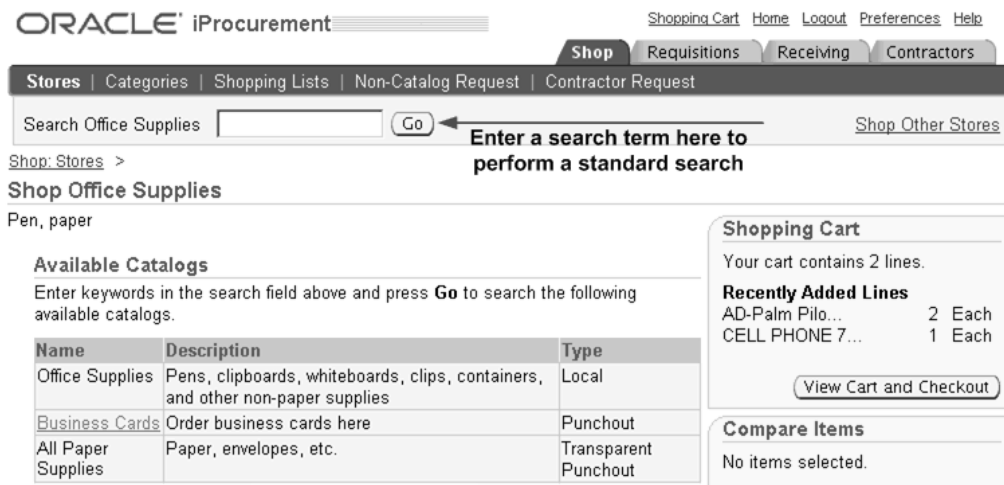
Standard search (quick search) is used when you simply type keywords in a store's Search field and click Go.

Standard Search from Shop Home Page



The figure above shows how you can perform a standard search from the **Shop** home page. My Favorite Store from the requester's preferences defaults in the drop-down menu next to the search field. The requester can select a different store from the menu and search it directly, or click a store.

Standard Search from Shop Store Page (When You Click a Store's Link)



The figure above shows what the **Shop Store** page looks like when you click a store's link on the **Shop** home page.

Exact Match of All Words

In a standard search, each keyword must be found to determine a match. For example, entering *blue ballpoint pen* finds items containing blue and ballpoint and pen (in any order). No stemming is performed.

Expanded Search



You may optionally expand a search by clicking "Look for any of the words, similar words, or spelling variations" at the bottom of the **Search Results** page, as shown in the following figure.

Expanded Search

Search Results from Office Supplies: legal

Search results filtered by: **No active filter.**

Hide Images Sort by Ascending Descending

	<p><u>Standard Classification Folders, Legal, Blue</u></p> <p>Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point cover durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners.</p> <p>Category: File Folders Supplier: Acme Supplies Suppl</p> <p>Manufacturer: National Supplies Manufacturer Item: Contr</p> <p>Price: 4.95 USD Unit: Each</p> <p>Quantity <input type="text" value="1"/> <input type="button" value="Add to Cart"/> <input type="button" value="Add to Fa"/></p>
	<p><u>Hanging Partition Fastener Folders, Ruby Red</u></p> <p>Durable 25-point pressboard covers in 4 bright colors. 6 separate filing section expansion. Adjustable tab for easy identification.</p> <p>Category: File Folders Supplier: Acme Supplies Suppl</p> <p>Manufacturer: National Supplies Manufacturer Item: Contr</p> <p>Price: 5.99 USD Unit: Each</p> <p>Quantity <input type="text" value="1"/> <input type="button" value="Add to Cart"/> <input type="button" value="Add to Fa"/></p>

✓ **TIP** Can't find it? Try the following options:

[Look for any of the words, similar words, or spelling variations](#)

[Create a Non-Catalog Request](#)

← **Click here to perform an expanded search**

Expanded search performs the following steps concurrently:

Match of Any Words with Stemming

The search engine looks for records that match one or more of your keyword(s). The search engine also uses stemming to return any record containing at least one of the search terms or stem derivatives.

Begins With (Wild Card)

The search engine appends a wildcard to the end of each keyword(s). For example, the search engine converts *lead pen* to *lead% pen%* and returns *lead pencils*.

Fuzzy Match

The search engine looks for records that closely resemble your item, but are spelled differently. For example, for *telefone*, the search engine returns *telephone*.

Note: When you use wildcards (% or *) in a keyword, stemming, begins with, and fuzzy logic are not applied.

Advanced Search

An "Advanced Search" link appears next to the search field. On the **Advanced Search** page, you can perform an advanced search on any store that does not contain a transparent punchout catalog, does not contain only a punchout catalog, or does not contain only an informational catalog.

Advanced Search Link on Shop Home Page

ORACLE[®] iProcurement [Shop](#) [Requisition](#)

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#) | [Contractor Request](#)

Search [Advanced Search](#)

Welcome, Rachel Kortel iProcurement

Stores

- [Industrial Supplies](#)
Hammers, nails, tapes
- [Travel](#)
Hotels, flight tickets, cars
- [Promotional Items](#)
Gifts for customers

Advanced Search Link on Shop Store Page

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

[Shop](#) [Requisitions](#) [Receiving](#) [Contractors](#)

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#) | [Contractor Request](#)

Search Office Supplies [Advanced Search](#) [Shop Other Stores](#)

[Shop: Stores](#) >

Shop Office Supplies

Pen, paper, business cards

Available Catalogs

Enter keywords in the search field above and press **Go** to search the following available catalogs.

Name	Description	Type
Office Supplies	Pens, clipboards, whiteboards, clips, containers, and other non-paper supplies	Local

Shopping Cart

Your cart contains 2 lines.

Recently Added Lines

AD-Palm Pilo...	2	Each
CELL PHONE 7...	1	Each

Compare Items

No items selected.

When you click the "Advanced Search" link, the **Advanced Search** page appears as shown in the following figure.

Advanced Search Page

ORACLE[®] iProcurement [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Shop [Requisitions](#) [Receiving](#) [Contractors](#)

[Stores](#) | [Categories](#) | [Shopping Lists](#) | [Non-Catalog Request](#) | [Contractor Request](#)

Advanced Search

Select store and enter search values in at least one of the following fields. Press **Go** to perform the search.

TIP Advanced search will not be conducted against items on external sites.

Store

Description

Supplier Item

Supplier

Shopping Cart

Your cart contains 2 lines.

Recently Added Lines

AD-Palm Pilo...	2
CELL PHONE 7...	1

Compare Items

No items selected.

[Shop](#) | [Requisitions](#) | [Receiving](#) | [Contractors](#) | [Shopping Cart](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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The first four fields on the **Advanced Search** page always display:

- Store
- Description (item description, not long description)
- Supplier Item
- Supplier

Advanced Search: Add Another

one of the follow

against items on

Main Store

Add Another

Description

Supplier Item

Supplier

Category

Manufacturer

Manufacturer Item

Unit Price

Unit

Currency

Internal Item Number

The figure above shows that advanced searching allows requesters to add the following fields using the Add Another drop-down menu:

- Description (item description, not long description)
- Supplier Item
- Supplier
- Category

- Manufacturer
- Manufacturer Item
- Unit Price
- Unit
- Currency
- Internal Part Number
- Supplier Part Auxiliary ID
- Lead Time
- UNSPSC Code

Note: You cannot customize the **Advanced Search** page using Oracle Applications Framework.

If you enter advanced search criteria in more than one field, the system performs an *and* search. For example, if you enter *laserjet printer* for Description, *Acme* for Manufacturer, between *500* and *1,000* for Unit Price, and *USD* for Currency, the search engine looks only for laserjet printers made by Acme costing between 500 and 1,000 USD.

If you search on the same criteria in more than one field, the search engine also performs an *and* search between the two fields. In the following example, you use two Description fields, the provided Description and a Description field you add. The table shows the results, depending on the qualifier you select from the pull-down menu:

Advanced Search Examples

First Description	Second Description	Result
<i>with all of the words</i> tape dispenser	<i>with the exact phrase</i> office supplies	Finds items containing tape and dispenser and office supplies
<i>with at least one of the words</i> tape dispenser	<i>with the exact phrase</i> office supplies	Finds items containing tape or dispenser and office supplies

Advanced search uses the following qualifiers:

- *with all of the words* performs an *and* search. (The words don't have to occur together.)
- *with at least one of the words* performs an *or* search.
- *without the words* excludes the keywords. In the following example, the search engine finds all pens not manufactured by Acme (specifically, items with pen in the Description, without Acme as the Manufacturer):
 - Description: *with all of the words*: pen
 - Manufacturer: *without the words*: Acme
- *with the exact phrase* looks for the same keywords, together, in that order.
- *is between, is greater than, is, and is less than* are used by Unit Price. For example, *is between 500 and 1,000* looks for an item costing more than 500 and less than

1,000. (Select a Currency to avoid displaying prices in all currencies between 500 and 1,000.) The qualifier *is* performs an exact match. For example, entering 1.21 finds items that cost 1.21, not 1 or .21 or .1.2134. The system looks for the transaction (supplier's) price and currency.

Advanced searching does not use stemming.

Items Displayed in Search Results

The following examples give an idea of how items in the local catalog display in the search results depending on how they were defined.

Example 1

In the following example, two items display in the search results because the supplier item number differs between them:

Source	Supplier	Supplier Item	Item	Operating Unit	Price	UOM
Blanket Purchase Agreement 1234	Acme	3255156	15225	Vision Operations	1.75	EA
Blanket Purchase Agreement 1234	Acme	3255157	15225	Vision Operations	15.25	BOX

Example 2

In the following example, two items display in the search results, each with its own price based on the supplier site given:

Source	Supplier	Supplier Item	Item	Operating Unit	Price	Supplier Site
Catalog file upload	Acme	CS1234	(none)	Vision Operations	11.99	San Francisco
Catalog file upload	Acme	CS1234	(none)	Vision Operations	9.99	New York

Example Item with Different Supplier Site-Based Prices

Search Results from All Local Content: legal


Search results filtered by: **No active filter.** [Add Filter](#) [Remove All Filters](#)

[Hide Images](#) Sort by Ascending Descending [Go](#)

[Previous](#) [Next 7](#)

[Standard Classification Folders, Legal, Yellow](#)

Durable, with 2-inch metal fasteners




Category: **Folders** Supplier: **Acme Supplies** Supplier Site: **New York**
Supplier Item: **CS1234** Internal Item Number:
Price: **9.99 USD** Unit: **EA**

Quantity [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

[Standard Classification Folders, Legal, Yellow](#)

Durable, with 2-inch metal fasteners



Category: **Folders** Supplier: **Acme Supplies** Supplier Site: **San Francisco**
Supplier Item: **CS1234** Internal Item Number:
Price: **11.99 USD** Unit: **EA**

Quantity [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

Oracle Services Procurement

Oracle Services Procurement items that have fixed-price services line types can display an editable Amount instead of a Quantity in the search results. These kinds of items exist if you have licensed and implemented Oracle Services Procurement, and you have extracted these items (on blanket agreements or requisition templates) to the Oracle iProcurement catalog.

Example Oracle Services Procurement Items

Search Results from All Local Content: service%

Sort by [Go](#)

Search results filtered by: **No active filter.** [Add Filter](#)

[Show Images](#) [Previous](#) [Next 7](#)

[Fixed Price Services](#)

Category **Computer Software - Other** Supplier **Supplier156** Supplier Site **SUPPLIER156S1**
Supplier Item Internal Item Number Contract Number **7198**

Amount (USD) [Add to Cart](#) [Add to Favorites](#) [Add to Compare](#)

The figure above shows a fixed price service item with an editable Amount of 500 USD, instead of a Quantity.

Note: The requester can edit the Amount only if the Price Override option is selected on the blanket agreement. If it is not selected, then the Amount is a display-only field in the search results.

When using schema editing to control whether a descriptor is search results visible, note that the Unit Price, Currency, Functional Currency Price, and Currency descriptors control how the Amount is displayed, just as they control how the Unit Price is displayed. The following table illustrates the results, depending on how the Search Results Visible descriptor property is set:

Functional Currency Price and Currency	Unit Price and Currency	Fixed Price Service Displayed in Search Results *	Quantity-Based Item Displayed in Search Results
Search Results Visible	Search Results Visible	Amount: 10.00 USD / 13.00 EUR	Price: 10.00 USD / 13.00 EUR
Search Results Visible	Not Search Results Visible	Amount: 10.00 USD	Price: 10.00 USD
Not Search Results Visible	Search Results Visible	Amount: 13.00 EUR	Price: 13.00 EUR
Not Search Results Visible	Not Search Results Visible	Amount does not display	Price does not display

* The Functional Currency Price and Currency for a fixed price service display as shown in this table only if Allow Price Override is *not* selected on the blanket agreement that contains the fixed price service. If Allow Price Override is selected, then the Functional Currency Price and Currency never display, even if set to be Search Results Visible. Instead, the Unit Price (Amount) displays in the transaction Currency (as shown in the figure above) - even if it is not set to be search results visible - and the requester can change this amount.

For more information on the Search Results Visible descriptor property, see Search Configuration, page D-13.

Related Links

After performing a search, the search engine provides a Related Links box on the search results page. The Related Links box appears only on the **Search Results** page for local catalogs. The Related Links box contains matching categories and a link to see matching shopping lists.

The purpose of the Related Links is to let requesters browse categories and shopping lists that contain the items in their search results. These categories and shopping lists may contain items that did not match the requester's search, but that are related. For example, a requester searches for *pen*. If the category *Glues* contains the item *refillable glue pen*, then *Glues* appears as a related category. Not all items in the *Glues* category have *pen* in their description.

Categories

Related categories contain items that match the search criteria. On the **Search Results** page, the requester can select a related category (and its subcategories if any) to see all matching items in that category.

Shopping Lists

Related shopping lists contain items that match the search criteria. On the **Search Results** page, the requester can click the link "Click here to see all related shopping lists," select a matching shopping list, and view all items contained on the shopping list. (The shopping lists link always appears; however, if there are no shopping lists, then the **Shopping List** page displays the text 'No matching shopping lists.')

There are two types of shopping lists: Personal Favorites (the requester's personal shopping list) and public lists. Public lists are created as requisition templates in Oracle Purchasing at the operating unit level and extracted to the catalog.

Filtering and Sorting

After search results are returned, requesters can further refine the results using the filtering option. Filtering allows the requester to limit the results set for the selected filtering criteria. For example, if you only want to see items from the suppliers Acme and Acme Supplier, choose to filter by Acme and Acme Supplier. All suppliers other than Acme and Acme Supplier are eliminated from the search results.

Any descriptor that is set up as search results visible can be selected as filterable criteria, except for the following descriptors:

- Unit Price
- Functional Price
- Description
- Long Description
- Image
- Thumbnail Image
- Comments
- Attachment URL
- Supplier URL
- Manufacturer URL

Similar to filtering, requesters can also sort the search results. For example, a requester searches for printer paper, and a large number of search results is returned. The requester can sort by Unit Price (Ascending) to view the least expensive supplies first. Most options sort alphabetically. Options like Unit Price sort numerically. Words enclosed in quotation marks and numeric characters are listed first. (Alphabetic sorting does not apply to all languages, such as Chinese.) Sorting by relevance is an additional sorting option. See Relevance Ranking, page D-15.

Note: If you have licensed and implemented Oracle Services Procurement, then sorting by Unit Price also sorts by Amount, for services items. (If the requester enters an Amount in the search results, and then performs sorting, the requester-entered Amount is ignored. The sorting goes off the default Amount.)

Any descriptor that is set up as search results visible can be selected as a Sort By option, except for the following descriptors:

- Thumbnail Image
- Attachment URL
- Supplier URL
- Manufacturer URL
- Image
- Functional Price

See Search Configuration, page D-13 for more information on search results visible descriptors.

Note: Local descriptors (descriptors, such as Ink Color, that are defined only for a specific category, such as Pens) that are search results visible are sortable and filterable only if you find the items by browsing a category or by selecting a category in advanced searching.

Supported Search Methods by Catalog Type

Local catalogs perform standard, expanded, and advanced searching as described earlier.

A transparent punchout sends the keywords the requester enters to the external catalog site. The external catalog site's search engine conducts the search and returns the matching results to the **Search Results** page.

Punchout and informational catalogs use keywords defined during their setup to find matching items. When setting up a punchout or informational catalog, you associate keywords with the catalog that, when entered as search criteria, display a link to the catalog on the **Search Results** page.

Other Catalogs on Search Results Page

The screenshot displays the Oracle iProcurement search results page. At the top, there is a navigation bar with 'ORACLE iProcurement' and links for 'Shopping Cart', 'Home', 'Logout', 'Preferences', and 'Help'. Below this is a secondary navigation bar with 'Shop', 'Requisitions', 'Receiving', and 'Contractors'. A search bar contains 'Search Office Supplies' and a 'Go' button, with an 'Advanced Search' link and a 'Shop Other Stores' link.

The main content area is titled 'Results from local or transparent punchout catalog' and shows 'Search Results Summary from Regular Office Supplies: folder'. It lists two items:

- Standard Classification Folders, Legal, Blue:** Ideal for case histories, tax records, sales records, etc. Sturdy, 25-Point covers are made of a heavyweight durable Pressboard bonded with long-lasting Tyvek® gussets. 2" metal fasteners are on the 2, 17 pt. kraft inner partitions.
 - Category: File Folders
 - Supplier: Acme Supplies
 - Supplier Item: FDR-0008
 - Manufacturer: National Supplies
 - Manufacturer Item:
 - Contract Number:
 - Price: 4.95 USD
 - Unit: Each
 - Quantity: 1
 - Buttons: Add to Cart, Add to Favorites, Add to Compare
- Hanging Partition Fastener Folders, Ruby Red:** Durable 25-point pressboard covers in 4 bright colors. 6 separate filing sections for documents and printouts. Sturdy kraft dividers with strong metal fasteners. Tear-resistant Tyvek gussets allow for 2 1/4" expansion. Adjustable tab for easy identification.
 - Category: File Folders
 - Supplier: Acme Supplies
 - Supplier Item: FDR-0007
 - Manufacturer: National Supplies
 - Manufacturer Item:
 - Contract Number:
 - Price: 5.99 USD
 - Unit: Each
 - Quantity: 1
 - Buttons: Add to Cart, Add to Favorites, Add to Compare

Below these items is a section for 'Search Results Summary from Oracle Exchange: folder', which includes a link to 'Oracle Exchange' and the text 'Visit exchange.oracle.com to find all of your office supplies.' This section is titled 'Results from Oracle Exchange punchout catalog'.

The final section is 'Search Results Summary from Acme Office: folder', which includes a link to 'Acme Office' and the text 'Visit the Web site of Acme Office to find office supplies and furniture. Acme Office also offers color copy services.' This section is titled 'Results from supplier site punchout catalog'.

A note on the right side of the page states: 'Note: In an actual Search Results Summary page, the first three matching items would be displayed.'

The figure above shows how the **Search Results** page looks if a store contains more than one catalog, and at least one of the catalogs is a punchout or informational catalog. For punchout or information catalogs, the **Search Results** page presents a link to the catalog.

For more details on punchout and transparent punchout, see the *Oracle Procurement Buyer's Guide to Punchout and Transparent Punchout*. For more details on informational catalogs, see the online Help in the eContent Manager.

Unlike local catalog searching, transparent punchout searching does not support the following features:

- Filter search results
- Add to favorites list
- Perform expanded search
- Perform advanced search

- Browse categories

In transparent punchout search results, you can sort by Price only.

Special Characters

Standard and advanced searching allows some special (non-alphanumeric) characters, as described below.

Class I: Non-Alphanumeric Characters Interpreted as Search Operators

The search engine supports the following search operators, both wildcards:

- %
- *

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

You can use a wildcard at the beginning of your search characters (for example, **shop*), but it slows search performance.

Class II: Non-Alphanumeric Characters Interpreted as Searchable Characters

Non-alphanumeric characters in Class II are indexed in the database and can be searched. The following is a list of Class II non-alphanumeric characters:

- Hyphen (-)
- Underscore (_)

For example, if the requester searches for *item-123 test*, the search engine looks for items that contain both *item-123* and *test*.

Note: Keywords with hyphens or underscores are treated as whole words. In the example above, a search on *item* does not find *item-123*. To search part of a word, use wildcards.

Class III: Non-Alphanumeric Characters Not in Class I or Class II

Class III non-alphanumeric characters are not indexed and are not searchable. If these characters appear in the search criteria, they are ignored and treated as white spaces. For example, if the requester searches for *red, white & blue*, the search engine ignores the comma (,) and ampersand (&), and looks for items that contain all the terms red and white and blue.

See Technical Details, page D-16 for further discussion.

Search Configuration

Schema editing and profile options affect searching.

Schema Editing

Searching is greatly influenced by schema editing. You can use schema editing to determine whether descriptors are searchable or whether they appear on the **Search Results Summary** and **Search Results** pages. A descriptor that is not searchable is

ignored by the search engine. A descriptor that is not search results visible is not displayed on the **Search Results Summary** and **Search Results** pages.

See Default Base Descriptors in Appendix C for a list of the default base descriptors and their default searchable and search results visible property settings.

Note: Use careful judgment when deciding which descriptors to make searchable:

- The more descriptors you make searchable, the longer it takes to perform a search.
- If you make long values like Long Description searchable, the accuracy of the search is diluted. For example, a requester enters a search for *computer battery*. If Long Description is searchable, an item with the following Long Description would be included in the search results: *This adapter works with the X Series notebook computer and can be used with or without a battery.*
- If you set a descriptor as searchable, but do not make it either search results visible or item details visible, requesters may not understand why an item was included in their search results.

After the following descriptors, only the first 11 search results visible descriptors in the sequence display in the search results, for space considerations: Thumbnail Image, Description, Long Description, Unit, Unit Price, Currency, Functional Currency Price, and Functional Currency (and Category).

For instructions on using the catalog loader to create descriptors, see Appendix C. For instructions on creating or updating descriptors online in the eContent Manager, see the online Help in the eContent Manager.

Advanced Search

The **Advanced Search** page's list of searchable descriptors is not affected by the schema editor. For example, if you set Manufacturer to be not searchable, it still displays as a searchable descriptor (field) on the **Advanced Search** page.

Although the **Advanced Search** page is not integrated with the schema editor in this way, setting the following descriptors to be not searchable will present an error message. If any of the following descriptors are set to be not searchable, they still display on the **Advanced Search** page, but requesters will see an error message when selecting the descriptor, saying they cannot search on it:

- Description
- Supplier Item
- Supplier
- Category
- Manufacturer
- Manufacturer Item
- UNSPSC Code
- Supplier Part Auxiliary ID
- Internal Part Number

Profile Options

The following profile options are key influencers to search behavior. For descriptions, see Set Profile Options, page 2-38.

- POR: Approved Pricing Only
- POR: Catalog Result Set Size
- POR: Enable Advanced Search and Category Browse
- POR: Search Governor Value
- POR: Sort by Relevance
- POR: Show Thumbnail Images
- POR: Thumbnail Height
- POR: Thumbnail Width
- POR: Change Catalog Language
- POR: Transparent Punchout Timeout Limit (affects transparent punchout search results only)

For example, if POR: Approved Pricing Only is set to Yes, requesters see in their search results only items associated with contracts, such as blanket purchase agreements.

The following functionality enables you to further influence the search results:

- When uploading catalog items, you can specify an operating unit for an item. The item is then visible in the search results only to requesters in that operating unit.
- The profile option PO: Legal Requisition Type affects whether requesters see only external supplier items, only internal items, or both.

Relevance Ranking

Relevance ranking is performed during standard, expanded, and advanced searching under either of two conditions:

- The POR: Sort by Relevance profile option is set to Yes (to always apply relevance ranking to the search results).
- The requester chooses Sort by Relevance for a specific set of search results (it doesn't matter how POR: Sort by Relevance is set).

The algorithm for the relevance calculation is complex, using scoring to rank the results. At a high level, relevance ranking does the following:

- First, how many search keywords does the item contain? An item that includes more search keywords is considered more relevant than an item that includes fewer search keywords. For example, the requester searches for *blue ballpoint pen*. Item 1 contains both *ballpoint* and *pen* in its searchable descriptors. Item 2 contains only *blue* in its searchable descriptors. Item 1 has a higher relevance score than Item 2.
- Second, how frequently do the search keywords appear in the searchable descriptors in the entire catalog? An item that contains less frequently found search keywords is considered more relevant than an item that contains more commonly found search keywords. For example, assume the search keyword *blue* appears in 500 items, and the search keyword *pen* appears in only 100 items. Item 1 contains the search key

word *pen* and Item 2 contains the search keyword *blue*. All else being equal, Item 1 has a higher relevance score than Item 2.

Note: Relevance ranking has a bigger impact on expanded searching than standard searching. Since all keywords appear in standard search results, the results aren't well differentiated by relevance, especially the first relevance algorithm described above. You can still perform relevance ranking on the standard search results, but the ranking is not as obvious as it may be in expanded search results.

Technical Details

Oracle iProcurement leverages the powerful technology of Oracle *interMedia* to store, manage, search, and access text with relational data using standard SQL and powerful text-based retrieval.

The Oracle iProcurement search engine converts the search text entered by the requester into a query expression to be used in an *interMedia* CONTAINS query. Depending on the search, the appropriate CONTAINS query is used.

Standard Search: match all search terms - *and* search

1. The search words are formed by splitting the search text with spaces. For example, when the requester searches for *ball point pen*, the search words are *ball* and *point* and *pen*.
2. Any *interMedia* reserved characters in the search words are escaped. (See Reserved Characters later in this chapter.)
3. The search words are joined with *interMedia*'s AND (&) operator.

For example, when the requester searches for *ball point pen*, the query expression in the *interMedia* CONTAINS query for this search phase would be as follows:

```
{ball}&{point}&{pen}
```

The query finds all the items that contain the words *ball* and *point* and *pen*.

Relevance is calculated during this search only if POR: Sort by Relevance is set to Yes. See Relevance Ranking, page D-15.

Expanded Search: stemming, begins with, and fuzzy search

1. The search words are formed by splitting the search text with spaces. For example, when the requester searches for *ball point pen*, the search words are *ball* and *point* and *pen*.
2. Any *interMedia* reserved characters in the search words are escaped. (See Reserved Characters later in this chapter.)
3. All search words without search operators are applied with an *interMedia* STEM (\$) operator, suffixed with an *interMedia* wildcard (%) character, and applied with an *interMedia* FUZZY (?) operator.
4. The search words are joined with *interMedia*'s ACCUM (,) operator.

For example, when the requester searches for *ball point pen*, the query expression in the *interMedia* CONTAINS query for this search phase would be as follows:

`#{ball},#{point},#{pen},ball%,point%,pen%,?{ball},?{point},?{pen}`

The query finds all items that contain any of the words *ball* or *point* or *pen*, including their *interMedia* stem derivatives, any word that starts with *ball* or *point* or *pen*, and any word in the fuzzy expansion of *ball* or *point* or *pen*.

Relevance is calculated during this search only if POR: Sort by Relevance is set to Yes. See Relevance Ranking, page D-15.

Fuzzy Expansion

The *interMedia* fuzzy operator expands the search words to take care of things such as spelling mistakes, typing mistakes, and errors by scanning machines.

Each letter in a language is associated with a set of alterations. For example, lower case letter L (l) might be associated with digit one (1), since it looks similar to letter l. The letter l might be also associated with the similar-looking letter i, or it might be associated with the letter k, which is next to the letter l in a keyboard. Each of the alternate letters is assigned a weight. For example, for the letter l, the digit 1 may be given a weight of 50 and the letter i may be given a weight of 10; digit l appears more like letter l than the letter i.

All of the search words in the search text are expanded using alterations of the letters in the search words. For all of the letters in a search word, the alterations are used to arrive at several permutations of the search word. A weight is calculated for those permutations of the search word. All the permutations that have a weight more than a predefined threshold are considered in the fuzzy expansion for the search word.

For a detailed description of how fuzzy expansion works, please find the public patent at <http://www.uspto.gov/patft/index.html>.

Advanced Search

Advanced search uses specific attribute fields to find items that match the keywords. Advanced searching does not use stemming.

Advanced search is implemented in *interMedia* by using sections for each of the searchable text attributes. For example, when the requester searches on the Description attribute, advanced search looks within the Description section in *interMedia*. Advanced search returns only items with a Description matching the keyword. For numeric attributes, advanced search does not use *interMedia* sections, but uses standard queries.

See Advanced Search, page D- 4 for information on how advanced search operators, such as *with the exact phrase*, work.

Reserved Characters

Reserved characters are non-alphanumeric characters that carry special meaning in *interMedia*. To properly classify them into the appropriate non-alphanumeric character classes (Class I, II or III, described earlier), they are escaped when entered as part of the search criteria. For example, a hyphen (-) is a searchable character; however, it also carries special meaning for *interMedia*. To interpret a hyphen as a searchable, rather than an *interMedia*, character, *interMedia* escapes the character.

The reserved characters are escaped by enclosing the search word within braces {}. If there is a % in the search word, either explicitly entered by the requester or introduced automatically by the search engine in a *begins with* search, {} cannot be used to escape

reserved characters. In this case, each reserved character is escaped separately with a backslash \ character.

The following 19 reserved characters are escaped:

, & ? { } \ () [] - ; ~ | \$! > _ =

Here are a few examples to illustrate how Class II and Class III non-alphanumeric characters are handled in the iProcurement search:

For Class II Non-Alphanumeric Characters:

The requester searches for *item_1% test*. In a standard search, the query expression in the *interMedia* CONTAINS query would be as follows:

```
item\_1%&{test}
```

In an expanded search, the query expression in the *interMedia* CONTAINS query would be as follows:

```
item\_1%,${test},item\_1%,test%,item\_1%,?{test}
```

The requester searches for *item-123 test*. In a standard search, the query expression in the *interMedia* CONTAINS query would be as follows:

```
{item-123}&{test}
```

In an expanded search, the query expression in the *interMedia* CONTAINS query would be as follows:

```
${item-123},${test},item\-123%,test%,?{item-123},?{test}
```

For Class III Non-Alphanumeric Characters:

The requester searches for *red+pen point*. In a standard search, the query expression in the *interMedia* CONTAINS query would be as follows:

```
{red+pen}&{point}
```

The *interMedia* parser treats + as a white space character because it is a non-alphanumeric character not defined as a printjoin. The matching items contain the phrase *red pen* and the word *point*.

The requester searches for *red&%*. In a standard search, the query expression in the *interMedia* CONTAINS query would be as follows:

```
red\&%
```

The *interMedia* parser treats the escaped & as a white space character because it is a non-alphanumeric character not defined as a printjoin. The search engine treats this search term as *red %* and usually results in an error message to refine the search criteria because of the presence of % as a separate word.

Searching in Other Languages

Catalog content is partitioned by language:

- When you upload content, you specify a language in the catalog file. The content is loaded to that language version of the catalog.
- When you extract content, master items that were translated in other languages are extracted to the corresponding language versions of the catalog. (Categories are extracted to all installed languages, regardless of whether they were translated.)
- Items returned from a transparent punchout should match the requester's search language, if the external site honors the search language.

If POR: Change Catalog Language is set to Yes, the requester can click a "Change Catalog Language" link on the **Shop** or search results pages to select a search language. The system then searches that language version of the catalog.

Note: When extracting or uploading content, the system also rebuilds the search index. Each language has its own search index, and the index is rebuilt differently depending on the language. Therefore, you should not load content to the wrong language version of the catalog.

PO History Feed File

This appendix contains detailed information about the PO reconciliation history feed file.

This appendix covers the following topics:

- Format and Data Elements of PO History Feed
- Sample PO History Feed File

Format and Data Elements of PO History Feed

After the appropriate purchase orders have been extracted using the selection criteria, the data elements for the purchase orders are compiled in the correct format and included in the output PO History Feed file. The PO History Feed file structure contains three levels of information, called records:

- Control Record: Transaction information about the complete PO History Feed file as well as summary information about all purchase orders included in the feed.
- Header Record: Header-level information for each purchase order included in the PO History Feed.
- Detail Record: Line-level and distribution-level information for each purchase order included in the PO History Feed.

The data elements included in each of the records in the PO History Feed file are discussed in details below.

Control Record

The table below discusses the data elements which are sent as the Control Record:

Control Record Layout

Field	Required	Length	Starting Position	Data Type	Action
1 - Record Type Indicator	Yes	1	1	Alpha	C (for Control)
2 - Creation Date Prefix	Yes	15	2	Alpha	Creation Date

Field	Required	Length	Starting Position	Data Type	Action
3 - File Creation Date	Yes	8	17	Numeric	YYYYMMDD - File Creation Date (system date when the PO History Feed request was completed)
4 - Total File Amount Prefix	Yes	19	25	Alpha	Total File Amount
5 - Sum of All PO Amounts	Yes	15 (12.2)	44	Numeric	Total Sum of all PO Amounts in file in functional currency of operating unit. Format for Number is 12.2. Send first 15 characters only and truncate if necessary. Should include purchase orders with all statuses (ON, CN, OH) for calculation. Refer to business rules below for details.
6 - Credit/Debit Indicator	Yes	1	59	Alpha	D for Debit, C for Credit
7 - Header Record Prefix	Yes	14	60	Alpha	Total Header

Field	Required	Length	Starting Position	Data Type	Action
8 - Total Header Records	Yes	5	74	Numeric	Total Number of Header Records in file. Should include purchase orders with all statuses (ON, CN, OH) for calculation. Refer to business rules below for details.
9 - Detail Record Prefix	Yes	14	79	Alpha	Total Detail
10 - Total Detail Records	Yes	5	93	Numeric	Total Number of Detail Records in file. Since canceled distributions on the PO are not included in the Detail Record, only non-canceled distributions should be counted during calculation. Refer to business rules below for details.
11 - Start Date Prefix	Yes	12	98	Alpha	Start Date

Field	Required	Length	Starting Position	Data Type	Action
12 - Transaction Start Date	Yes	8	110	Numeric	YYYYMMDD - Earliest last_update_date among all purchase orders in the file. Should include purchase orders with all statuses (ON, CN, OH) for calculation. Refer to business rules below for details.
13 - End Date Prefix	Yes	10	118	Alpha	End Date
14 - Transaction End Date		8	128	Numeric	YYYYMMDD - Latest last_update_date among all purchase orders in the file. Should include purchase orders with all statuses (ON, CN, OH) for calculation. Refer to business rules below for details.

The following rules apply to the data elements in the Control Record:

- All fields of data type Alpha are left-aligned and padded (if required) on the right with spaces. All field of data type Numeric are right-aligned and padded on the left (if required) with zeroes.
- Field #5 Sum of All PO Amounts sums up the PO Amount fields for all the Header Records in the functional currency of the operating unit. Calculation for field includes purchase orders with all statuses (ON, CN, OH) that are included in the feed, not just the purchase orders with a status ON. Calculation does not include the estimated tax for the purchase order.

- Field #6 Credit/Debit Indicator: Debit means (+) or Credit means (-), depending on the value for Field #5 Sum Of All PO Amounts.
- Calculation for Field #8 Total Header Records includes purchase orders with all statuses (ON, CN, OH) that are included in the feed, not just the purchase orders with a status ON.
- For calculation of Field #10 Total Detail Records, since canceled distribution(s) on the purchase orders are not included in the Detail Record, only non-canceled distributions are accounted for.
- Field #12 Transaction Start Date: The date contains the earliest last_update_date among all the purchase orders in the feed. Calculation for field includes purchase orders with all statuses (ON, CN, OH) that are included in the feed, not just purchase orders with a status ON.
- Field #14 Transaction End Date: The date contains the latest last_update_date among all the purchase orders in the feed. Calculation for field includes purchase orders with all statuses (ON, CN, OH), which are included in the feed, not just the purchase orders with a status ON.

Header Record

The table below discusses the data elements which are sent as the Header Record:

PO History Feed Header Record

Field	Required	Length	Starting Position	Data Type	Rules
1 - Record Type Indicator	Yes	1	1	Alpha	H (for Header)
2 - CM Ref #	Yes	2	2	Alpha	AX
PO Number	Yes	15	4	Alpha	Only purchase orders with numbers up to 15 characters in length are sent. Purchase orders with numbers greater than 15 characters in length are not included and a warning is generated. Refer to business rules below for additional details.

Field	Required	Length	Starting Position	Data Type	Rules
3 - Card Number	Yes	16	19	Alpha	<p>Number of P-Card being charged.</p> <p>Numeric only; non-numeric characters from the P-Card number are removed before sending.</p> <p>Only purchase orders with P-Card numbers up to 16 characters in length are sent. Purchase orders with P-Card numbers greater than 16 characters are not included and a warning is generated.</p> <p>Refer to business rules below for additional details.</p>
4 - Cardmember Name	Yes	35	35	Alpha	<p>In case of employee P-Cards: Card Member Name.</p> <p>In case of supplier P-Cards: Supplier Name.</p> <p>For both, only first 35 characters are included.</p>

Field	Required	Length	Starting Position	Data Type	Rules
5 - Requestor Name	No	25	70	Alpha	In case of supplier P-Cards: send blank. In case of employee P-Cards: Card Member Name. Only first 25 characters are included.
6 - Requestor ID	No	10	95	Alpha	Employee ID for requester. Only first 10 characters are included.
7 - Payment Type Indicator	Yes	1	105	Alpha	P for Employee P-Card. O for Supplier P-Card.
8 - Supplier Name	Yes	100	106	Alpha	Field used to send both Supplier Name and Supplier Site Name. Format of the field is Supplier Name-Supplier Site Name. Only first 100 characters are included.
9 - Client Supplier Number 1	No	30	206	Alpha	Vendor ID (po_headers.vendor_id) Only first 30 characters are included.
10 - Client Supplier Number 2	No	25	236	Alpha	Vendor Site ID (po_headers.vendor_site_id) Only first 25 characters are included.

Field	Required	Length	Starting Position	Data Type	Rules
11 - Order Date	Yes	8	261	Numeric	last_update_date from PO Header in YYYYMMDD format.
12 - Order Status	No	2	269	Alpha	Two-letter codes (ON, CN, OH).
13 - Total Lines in PO	Yes	4	271	Numeric	Total number of details records included. Since canceled distributions on the purchase order are not included as Detail Records, only non-canceled distributions are accounted for. Refer to business rules below for details. If purchase order has a control status of Canceled or Finally Closed, no distributions are included as detail records. Refer to business rules below for details.

Field	Required	Length	Starting Position	Data Type	Rules
14 - PO Amount	Yes	15 (12.2)	275	Numeric	Total Amount of purchase order in functional currency for operating unit. Even for purchase orders created in a currency different from functional currency for operating unit, the field is calculated in the functional currency (Refer to business rules below). Only first 15 characters are included.
15 - Credit/Debit Indicator	Yes	1	290	Alpha	D for Debit, C for Credit.
16 - PO Currency	Yes	3	291	Alpha	Always functional currency for operating unit. Uses three-letter ISO acronym.
17 - Local Currency Amount	Yes	15 (12.2)	294	Numeric	Purchase order amount in PO Header Currency. Only first 15 characters are included.

Field	Required	Length	Starting Position	Data Type	Rules
18 - Local Currency Code	Yes	3	309	Alpha	Currency in which purchase order is created (po_headers_all.currency.code). Uses three-letter ISO acronym.
19 - Header Miscellaneous	No	40	312	Alpha	Field not used.

The following rules apply to the data elements in the Header Record:

- All fields of data type Alpha are left-aligned and padded (if required) on the right with spaces. All field of data type Numeric are right-aligned and padded on the left (if required) with zeroes.
- For Field #2 PO Number, only purchase orders with numbers of length equal to or smaller than 15 characters are included in the PO History Feed. If the purchase orders have numbers greater than 15 characters in length, then they are not included in the PO History Feed. In this case, the concurrent request completes with a Complete Phase with Warning Status and generates a warning message in the log file.
- For field #3 Card Number, only numeric card numbers of length equal to or smaller than 16 characters are extracted. The card number on the purchase order document is stripped of all special characters or alphabets, which are used as separators (such as a space or '-'), so that only the numeric portion of the card number for the card is included. If after stripping the non-numeric portion of the card number, the length of the card number is greater than 16 digits, then the associated purchase order is not included in the PO History Feed. In this case, the concurrent request completes with a Complete Phase with Warning Status and generates a warning message in the log file.
- The logic to determine the values for field #12 Order Status is as indicated in the next table.
- When the purchase order has a control status of Canceled or Finally Closed, only the Header Record is sent with the Order Status field in the Header Record containing the value CN. No Detail Record is sent for that particular purchase order.
- Field # 13 Total Lines in PO contains the total number of Detail Records included for the purchase order. Only non-canceled Purchase Order Line Distributions in the purchase order are included as Detail Records for the purchase order.
- For purchase orders that are created in a currency different from the functional currency for the operating unit, field #14 PO Amount is still calculated in the functional currency using the applicable conversion rates.
- Field #14 PO Amount and field #17 Local Currency Amount do not include the estimated tax in the calculation.

Detail Record

The table below discusses the data elements which are sent as the Detail record

PO History Feed Detail Record

Field	Required	Length	Starting Position	Data Type	Rules
1 - Record Type Indicator	Yes	1	1	Alpha	D (for Detail)
2 - CM Ref #	Yes	2	2	Alpha	AX
PO Number	Yes	15	4	Alpha	Only purchase orders with numbers up to 15 characters in length are sent. Purchase orders with numbers greater than 15 characters in length are not included and a warning is generated.

Field	Required	Length	Starting Position	Data Type	Rules
3 - PO Line Number	Yes	4	19	Numeric	<p>Contains the PO Line Distribution Number.</p> <p>Since canceled distributions on the purchase order are not included as Detail Records, only non-canceled distributions are accounted for.</p> <p>If purchase order has a control status of Canceled or Finally Closed, no distributions are included as detail records, and this value will be 0.</p> <p>Refer to business rules below for details.</p>
4 - Quantity	No	10 (7.2)	23	Numeric	<p>Quantity of items ordered.</p> <p>Only first 10 characters are included.</p>
5 - Unit of Measure	No	25	33	Alpha	<p>Unit of Measure for ordered items (po_lines.unit_meas_lookup_code).</p> <p>Only first 25 characters are included.</p>

Field	Required	Length	Starting Position	Data Type	Rules
6 - Unit Price	No	10	58	Numeric	Price per item ordered. Only first 10 characters are included. Refer to business rules below for details.
7 - Item Description	No	40	68	Alpha	Description of item ordered (mtl_system_items_kfv.description). Only first 40 characters are included.
8 - Accounting Code	Yes	180	108	Alpha	Charge Account for distribution (po_distributions.code_combination_id). Individual accounting segments are separated by a semicolon. Only first 180 characters are included. Semicolons are included in the field length count.
9 - Client Inventory Number	No	40	288	Alpha	Client Inventory Number (mtl_system_items_kfv.item_number). In case of non-catalog requests, field is blank. Only first 40 characters are included.

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