

# Oracle - PeopleSoft Purchasing/eProcurement Accelerated Rel 9.2

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This PeopleSoft Purchasing / eProcurement Accelerated Rel 9.2 training helps you become familiar with several advanced features, like creating and using requisitions and purchase orders in both Purchasing and eProcurement. Expert Oracle University instructors describe the key integration points with other PeopleSoft applications. This 9.2 course has been updated through Update Image 14.

## Learn To:

- Create requisitions.
- Set up buyers, suppliers and items.
- Use approval workflow.
- Create basic and advanced requisitions.
- Setup eProcurement.
- Setup purchasing.

## Benefits to You

Enrolling in this course will teach you how to use the major features of PeopleSoft eProcurement and PeopleSoft Purchasing, which you can apply and build on when you return to your own business environment. Learn the entire process of creating a requisition and dispatching a purchase order. Activities throughout the course provide stepwise examples that simulate scenarios in businesses like yours. You'll leave the class with a good overall understanding of the Purchasing and eProcurement applications, and you'll be better prepared to use the applications for your organization.

## Requisition to Purchase Order Process Flow

This course will also help you develop knowledge about how the requisition to purchase order process flow is completed in both applications. This includes approval workflow, sourcing requisitions and managing purchase orders. This perspective helps you decide how to set up your system and also helps you create your business process practices. You'll also explore Direct Connect, as well as online supplier procurement.

## Skills Gained

- Set up commonly used advanced features
- Create requisitions and purchase orders
- Setup and create change orders
- Set up basic purchasing transactions and run processes
- Receive items

- Setup eProcurement business units and vendors
- Describe the business process flow and basic functionality of the Enterprise PeopleSoft Purchasing system
- Create items, categories, and catalogs
- Define users and role actions
- Set up the basic structure for using PeopleSoft Purchasing

## Who Can Benefit

- Analyst
- End User
- Implementer
- Systems Administrator

## Prerequisites

### Required Prerequisite

- Understand basic navigation and PeopleSoft concepts
- Use control tables to enforce business rules
- Run processes and reports

## Course Details

### Topics

- Business Process Overview
- Establishing Business Units and Processing Options
- Setting Up Required Table Information
- Determining Supplier Basics for Purchasing and eProcurement
- Setting Up Purchasing Items for Purchasing and eProcurement
- Using the Approval Framework and Creating Requisitions
- Managing Approvals, Sourcing Requisitions, and Creating Purchase Orders
- Managing Purchase Orders
- Demonstrating Receiving
- Demonstrating the Change Order and Delete Functionality
- Configuring Additional Procurement Options
- Creating and Using Purchasing Contracts
- Understanding the eProcurement Business Process
- Performing Basic Setup for eProcurement
- Creating and Maintaining Catalogs
- Establishing Users and Roles
- Using the Approval Framework and Creating Basic Requisitions in eProcurement

- Sourcing Requisitions
  - Managing Purchase Orders in eProcurement
  - Changing Requisitions and Purchase Orders
  - Using Receipts and Returns in eProcurement
  - Using Miscellaneous Charges and Maintaining Price Adjustments in eProcurement
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- Understanding the PeopleSoft Purchasing Business Process Flow and Functionality
  - Understanding the Integration Points between PeopleSoft Purchasing and other PeopleSoft Applications
  - Understanding the Default Hierarchy
  - Buyer WorkCenter
  - Buyer WorkCenter Dashboard

## **Establishing Business Units and Processing Options**

- Defining Installation Parameters
- Creating PeopleSoft Purchasing Business Units
- Creating PeopleSoft Purchasing Processing Options

## **Setting Up Required Table Information**

- Creating Locations
- Adding Ship To Locations
- Setting Up User Preferences
- Setting Up Requesters
- Setting Up Buyers

## **Determining Supplier Basics for Purchasing and eProcurement**

- Configuring the Supplier Set Control Page
- Establishing Supplier Processing Authority
- Searching for a Supplier
- Adding a New Supplier
- Approving a Supplier and Inactivating Suppliers
- Viewing Supplier Name History
- Supplier Onboarding
- Using the Supplier Administration Center

## **Setting Up Purchasing Items for Purchasing and eProcurement**

- Creating Item Categories
- Creating Purchasing Items
- Copying and Loading Items
- Approving Items
- Creating Units of Measure
- Setting Up a Purchasing Kit

## **Managing Approvals, Sourcing Requisitions, and Creating Purchase Orders**

- Managing Approvals
- Editing Requisitions
- Delegating Responsibility and Monitoring Approvals
- Describing Sourcing
- Sourcing Requisitions Online
- Sourcing Requisitions by Using the Auto-select Requisitions Process
- Building Inventory Demand
- Using the Sourcing Workbench Component

## **Managing Purchase Orders**

- Explaining the Purchase Order Business Process and Structure
- Creating and Updating Purchase Orders
- Creating a Purchase Order by Copying from Another Document
- Using the Buyer's Workbench
- Evaluating Options to Dispatch Purchase Orders
- Mass Buyer Changes
- Advanced Purchase Order and Requisition Line Search

## **Demonstrating Receiving**

- Describing the Receiving Business Process
- Identifying Receiving Setup Information
- Understanding the Receiver Workbench
- Defining Receipt Statuses
- Creating a Receipt with a Purchase Order
- Creating a Receipt Without a Purchase Order
- Describing How Purchasing Receipts Interface with PeopleSoft Applications
- Describing the Receipt Accrual Process

## **Demonstrating the Change Order and Delete Functionality**

- Describing Purchase Order Change Templates
- Creating Change Orders for Purchase Orders
- Viewing Purchase Order Change Order History
- Describing the Change Order Request Process
- Distinguishing Between Purchase Order Cancellations and Deletions
- Deleting a Purchase Order
- Describing Requisition Change Tracking
- Describing Requisition Deletion

## **Configuring Additional Procurement Options**

- Describing Distribution Networks

- Setting Up Miscellaneous Charges/Landed Costs and Templates
- Combining Miscellaneous Charges with Items or Purchase Orders
- Setting Up Sales and Use Tax
- Setting Up Supplier Price Adjustment Rules

## **Creating and Using Purchasing Contracts**

- Defining Contract Set Controls
- Explaining Master Contracts
- Creating Purchasing Contracts
- Generating Contract Purchase Orders
- Explaining Blanket Purchase Orders

## **Understanding the eProcurement Business Process**

- Describing PeopleSoft eProcurement Features
- Describing PeopleSoft eProcurement Integration
- Describing the PeopleSoft eProcurement Process Flow

## **Performing Basic Setup for eProcurement**

- Establishing System Options
- Defining Processing Options for Purchasing and eProcurement
- Setting Up Codes
- Defining the Accounting Structure
- Identifying Procurement Options

## **Creating and Maintaining Catalogs**

- Explaining How Item Catalogs are Used in eProcurement
- Creating Catalog Trees
- Establishing Catalog Security

## **Establishing Users and Roles**

- Setting Up Users for eProcurement
- Setting Up Requesters and Buyers for eProcurement
- Establishing User Preferences for eProcurement

## **Sourcing Requisitions**

- Describing the Sourcing Process Flow
- Expediting Requisitions
- Using the Quick Sourcer

## **Managing Purchase Orders in eProcurement**

- Managing Purchase Orders
- Dispatching and Publishing Purchase Orders

- Evaluating the Message Log

## Changing Requisitions and Purchase Orders

- Describing the Requisition Change Process in eProcurement
- Establishing the Requisition Change Process
- Using Change Requests in Dispatched Purchase Orders
- Creating Requisition Change Requests

## Using Receipts and Returns in eProcurement

- Returning Items to Suppliers
- Receiving Items as a Power User

## Using Miscellaneous Charges and Maintaining Price Adjustments in eProcurement

- Setting Up Miscellaneous Charges
- Using Miscellaneous Charges
- Setting Up Price Adjustment Rules for Suppliers
- Adding Price Adjustments to Purchase Order Schedules

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## Schedule (as of 3 )

**Date**

**Location**

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