

# PEOPLESOFT ePROCUREMENT



*Provide visibility and control of indirect goods.*

*Improve supplier relationships.*

*Empower employees to make better, faster, more-informed decisions.*

An important part of supplier relationship management (SRM) is managing spend through increased visibility and control of indirect goods throughout the organization. A key component of Oracle's PeopleSoft Enterprise SRM solution, Oracle's PeopleSoft Enterprise eProcurement, is helping many organizations achieve the objective of making their procurement processes more efficient and leveraging their supply base to their competitive advantage. Customers who implement PeopleSoft eProcurement typically realize value across the organization by:

- Reducing overall costs by controlling spending, lowering the cost of goods, and decreasing transaction costs.
- Empowering employees to make better, faster, more-informed decisions—and giving them more time to focus on meaningful, value-added tasks.
- Streamlining supplier relationships through web-enabled transactions and reduced errors.

## **Controlling All Spend**

We designed PeopleSoft eProcurement for organizations that want a web-based solution to decentralize, automate, and control purchasing, enabling:

- Deployment of procurement functionality throughout the organization.
- Automation and control of the procurement process both inside and outside the enterprise.
- Streamlining of supplier relationships.
- Dramatic reduction of both processing and material costs.
- Effective tracking of supplier performance.
- Leveraging of spending to negotiate better contracts with suppliers.
- Real-time access to inventory information.
- Reduction of inventory levels.

PeopleSoft eProcurement streamlines your processes by using intuitive pages and powerful search engines to guide requesters through the steps of procurement. When you need validation, it happens in real time.

## **Flexible Solution**

Depending on the unique requirements of your organization, you determine how much centralized or decentralized control is appropriate. You can:

- Organize your eProcurement information, rules, and processes the same way you organize your business.

- Manage eProcurement information by using web pages instead of dedicated applications.
- Set up separate and shared processing methods and rules for unique business units.
- Use the installation wizard to set up and maintain eProcurement system processes, publishing rules, direct supplier integration role definitions, and Express Forms.
- Reserve the use of scarce IT resources by enabling functional personnel to maintain their own workflow activities, catalog maintenance, and requester population.

Description	Qty	UOM
AT8090 Altimeter	1	EA
Aurbeo, Queen	1	EA
Item Lines: 2		
Total Amount (USD): 47.00		

### Comprehensive Search Functionality

Powerful, yet intuitive search capabilities help to easily find the right item.

### Universal Request Processing

Designed for casual users, PeopleSoft eProcurement enables you to distribute the power of purchasing throughout your organization. You can:

- Provide a single source for employees across the enterprise to order products.
- Accelerate self-service adoption using simple 3-step requisitioning process.
- Use the Catalog Browser to find the right item quickly.
- Enter a special request for unique or one-time purchases.
- Request items seamlessly from inventory locations and query inventory levels prior to submission.
- Use powerful Express Forms to gather full details related to more complex requests.
- Maintain, group, and share favorite item lists by requester.
- Create, manage, and use personal and global templates.
- Add items rapidly using the Express Requisition.
- Specify delivery to multiple locations with multiple delivery schedules for each line item, and multiple accounting charges per delivery.

- Ship items to a one-time location.
- Charge requests to projects.
- Attach documents related to the request.
- Select graphically tagged items that represent best value or items based on contracts, preferred suppliers, and recommendations.
- Compare products side by side to select the right one for you.
- Obtain real-time price and availability checks on items prior to request submission.

### **Powerful Search Tools**

Oracle's PeopleSoft Enterprise provides a powerful and flexible searching mechanism to find the exact item you want quickly. PeopleSoft eProcurement:

- Provides fast, powerful search capabilities that enable item selection and comparison from role-based online catalogs.
- Enables an advanced search that recognizes synonyms, matches case, and allows for Boolean logic to easily find items that meet requesters' criteria.
- Enables parametric search on attributes that are registered to a category.
- Maintains role-based custom item catalogs that enable requesters to order from item categories that are relevant to their role in the organization.
- Compares multiple items easily to choose the best one for your needs.

### **Sophisticated Workflow Approvals— Anytime, Any Place**

You can create sophisticated workflow rules for approval or notification within your organization —graphically and without coding—all from your browser. You can approve eProcurement requests anytime, anywhere to:

- Configure workflow approvals based on criteria that's appropriate for your organization.
- Receive notification of approvals through email, a worklist item on the portal, or even through a wireless device.
- Use serial and parallel approval paths or add approvers and/or reviewers as needed during the approval process.
- Authorize line item approval for multiple line requests.
- Perform approvals through a wireless device.
- View full details of requests, including detailed product information, cost distributions, attachments, and requester comments.
- Edit requests during the approval process.

### **Quick Budget Checking and Commitment Control**

PeopleSoft eProcurement enables budget checking and encumbrance accounting during the procurement process so that you can:

- Determine availability of funds when the requisition is generated.
- Commit funds against a budget for procurement activities.
- Establish tolerances to enforce tight or loose control of commitments, encumbrances, and expenditures against a budget.
- View request status to edit or resubmit noncomplying requisitions.

**Manage Requisitions**

**Search Requisitions**  
To locate requisitions, edit the criteria below and click the Search button.

Business Unit: US001 Requisition Name:

Requisition ID:  Request Status: PO(s) Dispatched Budget Status:

Date From: 01/11/2000 Date To: 01/18/2007

Requester: VP1 Entered By:  PO ID:

**Requisitions**  
To view the lifespan and line items for a requisition, click the Expand triangle icon:    
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000000105	0000000105	US001	08/12/2003	PO(s) Dispatched	Valid	80,264.90USD	*Select Action... Go

Requester: Kenneth Schurnacher Entered By: Theresa Monroe Priority: Medium

**Request Lifespan:**

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

**Line Information**

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	Desktop - Standard 160Mb Ram...	Pending Approval	1524.88043	USD	10.0000	EA	Tandem Computers

### Manage Requisitions

The Manage Requisitions Lifespan gives requesters an at-a-glance view of where their requisition is in the lifecycle, and allows them to drill in to view further details.

### Real-Time Tracking and Complete Requisition Management

PeopleSoft eProcurement gives you a 360-degree view of the entire requisition-to-pay cycle. You can:

- Track the full business cycle of requests— from initiation to final payment.
- View the entire approval process, with graphical displays of each step.
- View resulting purchase order details.
- View material stock requests for items that are being sourced from inventory.
- Access online receipts and view receipt history.
- Receive supplier notifications.
- Issue change requests.
- Return items to suppliers for credit, exchange, or replacement.

### Online Receipt Management

With PeopleSoft eProcurement, you can receive and track items through the receiving process. You can:

- Perform a receipt transaction either by requesters from their desktop or from a centralized receiving area.
- Process returns of inventory or expensed items for replacement or credit and

specify the returned quantity and reason.

- Have product receipt prompts sent to requesters on receipt of invoice to ensure proper match controls.
- Allow receiving security to be controlled by requester or ship-to location.

### **Leveraging Procurement Cards**

To reduce the cost of small-dollar purchases, PeopleSoft eProcurement supports the use of procurement cards. With this feature, you can:

- Enable requesters to apply for the card online by using an Express Form.
- Specify cardholders' defaults, including the cards they are authorized to use, default general ledger account numbers, security levels, and spending limits.
- Load statements automatically from the bank.
- Review expenditures, override default accounts, add additional account distributions, add eProcurement item information, and track disputes online.
- Pay the credit card provider with the same payment process used for vouchers and expenses in Oracle's PeopleSoft Enterprise Payables.
- Post automatically to the general ledger.

### **Comprehensive Supplier Enablement**

Integrate with all your suppliers, regardless of their technology. PeopleSoft eProcurement supports the full spectrum of supplier enablement capabilities, from paper-based faxing through full EDI- or XML-based integration to the suppliers' order management systems. You can:

- Use custom catalogs that are created by your supplier, managed by a third-party content provider, or downloaded from public marketplaces.
- Leverage delivered UNSPSC item categorization or use your own enterprise-specific categorization to evaluate your purchasing activity.
- Use supplier images and content to display on your internal web catalog.
- Take advantage of Direct Connect to seamlessly connect to supplier sites that offer content, collaborative tools, and special requirements. Direct Connect supports all standard XML-based interactions with suppliers.
- Manage content from multiple suppliers in disparate formats with Oracle's PeopleSoft Enterprise Catalog Management application (optional).
- Collaborate with your smaller suppliers through Oracle's PeopleSoft Enterprise SCM Portal Pack (optional).

### **Superior Procurement Analysis and Reporting**

PeopleSoft eProcurement enables you to consolidate data from multiple purchasing systems into one database for enterprise analytics. In addition to a long list of standard reports, it includes transactional analysis pages to measure:

- Spend by category.

- Sourcing analysis.
- Workflow approval analysis.

### Full Enterprise Integration

When you integrate eProcurement with your enterprise management applications, you extend your investment. No other solution can match eProcurement integration. By sharing common data structures, your entire organization can simultaneously access the same information, enabling you to:

- Manage your requesters from Oracle's PeopleSoft Enterprise Human Resources.
- Issue purchase orders from one location to simplify reporting.
- Populate Payables vouchers from eProcurement purchase orders.
- Perform matching validation between receipts, purchase orders, and invoices.
- Generate debit memos automatically with Payables for goods returned to the supplier.
- Load inventory items into your catalog for internal catalog items.
- Charge requests to Oracle's PeopleSoft Enterprise Projects for full project accounting.
- Identify assets for tracking and workflow approval.
- Ensure full system synchronization with your PeopleSoft Enterprise Management applications.
- Access the only true end-to-end solution for ordering goods and services from the same requisition when integrating with Oracle's PeopleSoft Enterprise Services Procurement.
- Operate the system as a stand-alone application or for implementation with legacy systems.

### Globalization

To meet the demands of the global market, Oracle's PeopleSoft Enterprise eProcurement supports full internationalization (with multilingual and multicurrency capabilities) and is localized in at least 12 languages. It also supports multiple tax methods, including value-added tax (VAT), goods and service tax (GST), and other sales and use tax requirements.

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