

# PEOPLESOFT ENTERPRISE ePROCUREMENT



## FEATURES

- Self-service procurement solution for the entire organization
- Role-based catalogs
- Powerful and flexible search capability
- Workflow approvals anytime, anyplace
- Procurement cards
- Supplier enablement

## BENEFITS

- Provide visibility and control of indirect goods
- Improve supplier relationships
- Empower employees to make better, faster, more informed decisions

*Oracle's PeopleSoft Enterprise eProcurement, an integral component in Oracle's PeopleSoft Enterprise SRM solution, manages spend through increased visibility and control of indirect goods. It achieves that objective by making an organization's procurement processes more efficient and by leveraging their supply base to their competitive advantage.*

### Controlling All Spend

PeopleSoft eProcurement is a web-based solution used to decentralize, automate, and control purchasing. PeopleSoft eProcurement streamlines your processes by using intuitive pages and powerful search capability to guide requesters through the steps of procurement. It enables:

- Deployment of common procurement functionality for an entire organization.
- Streamlining of supplier relationships and effective tracking of supplier performance.
- Dramatic reduction of processing, material costs, and inventory levels.
- Leveraging of spend to negotiate better contracts with suppliers.
- Real-time access and validation, including on-hand inventory quantity.

### Flexible Solution

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

- Organize your PeopleSoft eProcurement rules and processes the same way you organize your business.
- Manage eProcurement information by using web pages instead of dedicated applications.
- Share common processing methods and rules across business units and implement unique processing and rules as the exception.
- Use the installation wizard to set up and maintain eProcurement system processes, publishing rules, direct supplier integration, role definition, and express forms.
- Empower functional personnel by letting them maintain their own workflow activities, catalog maintenance, and requests. Scarce IT resources are now free to focus on other needs.

## 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 procurement adoption using a simple three-step requisitioning process.
- Use the Catalog Browser to find the right item quickly.
- Highlight the best value items based on contracts, preferred suppliers, or recommendations, and obtain real-time price and availability before submitting a request.
- Compare products side by side to select the right one for you.
- Enter a special request for unique or one-time purchases.
- Request items from inventory locations and query inventory levels before submitting the request.
- Use powerful express forms to gather complete details related to complex requests.
- Maintain, group, and share favorite item lists by requester.
- Specify delivery to multiple locations and delivery schedules for each line item, multiple accounting charges per delivery, and one-time shipping locations.
- Properly charge to the correct department, accounts, and projects.

## Powerful Search Tools

Oracle's PeopleSoft eProcurement provides powerful and flexible searching to find the exact item you want quickly. The eProcurement search enables:

- Requesters to select, compare, and order items and services from role-based online catalogs that are tailored to their role in the organization.
- Use of synonyms, match case, and Boolean logic to find items easily that meet requesters' criteria.
- Parametric search of attributes that are registered to a category.

The screenshot displays the Oracle PeopleSoft eProcurement 'Create Requisition' interface. The top navigation bar includes 'Home', 'Worklist', 'MyChannel Console', 'Add to Favorites', and 'Sign Out'. The left sidebar contains a 'Menu' with options like 'Buyer Center', 'Manage ERP Integration', 'Create Requisition', 'Manage Requisition', 'Approve Requisitions', 'Release Items', 'Procurement Card Center', and 'Requests'. The main content area is titled 'Create Requisition' and features three steps: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit'. Below the steps is a search bar with a 'Search' button. The 'Catalog' section includes a dropdown menu for 'Select a catalog' (set to 'All Purchase Items') and a 'Browse Catalog' section with a 'Search Catalog' form. The search form includes fields for 'Description', 'Manufacturer', 'Manufacturer's Item ID', 'Vendor', 'Vendor Item ID', and 'Item ID'. A 'Search' button and a 'Search Settings' link are also present.

**Figure 1: Powerful and intuitive search capabilities help find the right item easily.**

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

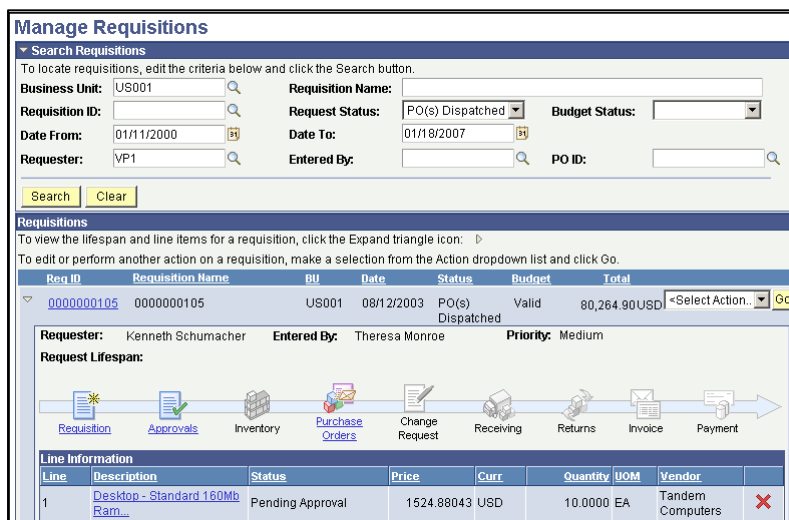
You can create sophisticated workflow rules for approval or notification within your organization - graphically and without coding - all from your browser. You can approve eProcurement requests anytime, anywhere to:

- Configure workflow approvals based on criteria appropriate to your organization.
- Receive notification of approvals through email, a worklist item on the portal, or wireless device, and perform approvals while out of the office using a wireless device.
- Use serial and parallel approval paths or add approvers, reviewers, or both, as needed during the approval process.
- Authorize line item approval and re-approval for multiple line requests.
- View full details about 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 a 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 noncompliant requisitions.



**Figure 2. Manage Requisitions - the Manage Requisitions Lifespan gives requestors an at-a-glance view of where their requisitions are in the life cycle, and it allows them to drill down to 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 and 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.

### **Change Request Tracking, Audit Trail, and Re-approval Controls**

Requester requirements can change frequently, and requesters must be able to communicate the changed requirements easily and effectively through the procurement system. The requester can change requisitions after they are sourced to purchase orders, track the changes within the system, and have these changes go through the appropriate approvals. Change request tracking captures and tracks all header, line, and schedule changes made to eProcurement requisitions. Buyers, requesters, and managers can view the audit trail of changes to eProcurement requisitions at any time. Users can view what changes were made, when the changes were made, who made the changes and the reason for the changes. The organization determines what type of change triggers re-approval. For example, re-approval may be necessary for price changes but not required for changes to a delivery location.

The application automatically initiates a PO Change Request if the requisition is already sourced. Change Request processing ensures that changes initiated from the requester, such as an increase in the order quantity, will be in sync with the purchase order and that all necessary approvers have reviewed the change request before updating the purchase order. The purchase order will correctly reflect the quantity associated with the requisition.

### **Online Receipt Management**

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

- Perform a receipt transaction either from requesters at 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 an 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 their 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 a 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 and 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 connect seamlessly 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).

### Oracle Supply Network and Exchange

PeopleSoft eProcurement leverages the Oracle Supplier Network (OSN) and exchange.oracle.com (Exchange) as part of an integrated supplier network solution. Combining OSN and Exchange with eProcurement streamlines processing, reduces errors, and shortens processing time. Suppliers can view messages and exceptions, and monitor their transactions and activities.

OSN is a hosted service offering from Oracle that functions as a hub between the supplier and the PeopleSoft procurement system. It handles transactions between the two, such as purchase orders, change orders, advance shipping notices (ASNs), and invoices. It lowers costs by integrating suppliers into procure-to-pay processes and enables machine-to-machine messaging with minimal IT involvement.

### 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 and workflow approval analysis.

### Full Enterprise Integration

When you integrate PeopleSoft 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 integrate with :

- Human Capital Management - Manage your requesters from Oracle's PeopleSoft Enterprise Human Resources.
- Accounts Payable – Populate Payables vouchers from eProcurement purchase orders; perform matching validation among receipts, purchase orders, and invoices; and generate debit memos automatically with Payables for goods returned to the supplier.
- Inventory – Load inventory items into your catalog for internal catalog items, visibility into inventory levels, and allocation of inventory from the requisition.
- Project Costing and Asset Management – Charge requests to Oracle's PeopleSoft Enterprise Projects for full project accounting; identify assets for tracking and workflow approval.
- Supplier Contract Management – Create a supplemental request document by launching a wizard that captures needed information pertaining to the contract request.
- Services Procurement – 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 , goods and service tax, and other sales and use tax requirements.

## Contact Us

For more information about PeopleSoft eProcurement, please visit [oracle.com](http://oracle.com) or call +1.800.ORACLE1 to speak to an Oracle representative.



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