

PeopleSoft Purchasing



Oracle's PeopleSoft Purchasing enables efficient, cost-effective procurement of raw materials, goods, and services. It streamlines your procurement process through automated sourcing of requisitions, workflow approvals and exception-based notifications, and electronic commerce, including XML messaging; and electronic data interchange (EDI) transactions, email, faxing, and item sourcing through electronic catalogs.

KEY FEATURES

- Complete requisition and purchase order processing
- Procurement Contracts
- Commitment control
- Robust graphical workflow
- Supplier rebate processing
- Change control tracking and re-approval options
- Automatic item substitution
- Complete receiving functionality, including internal delivery tracking
- Chain of Custody tracking for sensitive receipts and deliveries
- Procurement Cards
- Buyer WorkCenter
- Mobile capabilities
- Pivot Grid reporting

KEY BENEFITS

- Streamline your procurement process
- Manage all purchasing activities online and while on-the-go
- Enjoy global support—multilanguage, multicurrency, multiple tax localization methods

Globalization

To meet global market demands, PeopleSoft Purchasing supports multilingual and multicurrency requirements. It also provides support for multiple tax methods, including value-added tax (VAT) and sales and use tax.

Flexible System Setup

Using PeopleSoft Purchasing, you determine how much centralized or decentralized control is appropriate for your organization's unique requirements.

You can:

- Organize your purchasing information, rules, and processes the same way you organize your business.
- Define unlimited business units and share common processing methods and rules across business units.
- Use extensive and flexible defaulting to increase data entry efficiency and accuracy.
- Take advantage of user-defined fields that you can attach to purchasing documents and pass through the system without affecting Purchasing functions

Extensive Control of Supplier Information

PeopleSoft Purchasing manages Supplier information so you will have the answers that you and your Supplier need. It provides the following capabilities:

- Sharing of Supplier information across business organizations.
- Segregation of Supplier entry and approval processes to support Governance, Risk, and Compliance controls.

- Tracking and monitoring of Supplier performance. PeopleSoft Purchasing provides user-defined Supplier classification codes.
- Management of complex Suppliers with multiple locations to support unique location characteristics, such as payment terms and matching rules. The application supports an unlimited number of addresses and contacts.

Comprehensive Item Information

PeopleSoft Purchasing captures and maintains records of raw materials, goods, and services. Use it to:

- Reduce contract leakage by allowing requesters to order only from item categories for which they are authorized.
- Use purchasing classifications such as the UN/SPSC to support management and analysis of items at different hierarchical levels. Quickly and efficiently update large groups of items using item catalog maintenance and load electronic item catalogs from your vendors.
- Maintain Global Trading Item Numbers (GTINs) and universal product numbers (UPNs).
- Capture effective-dated, quantity-based standard prices and supplier prices. Specify item sourcing options such as priority supplier, split sourcing, and flexible sourcing based on user-defined weighting factors.
- Maintain item and item class receipt and inspection rules.

RELATED PRODUCTS

The following products support Oracle PeopleSoft Purchasing:

- PeopleSoft eProcurement
- PeopleSoft Services Procurement
- PeopleSoft Strategic Sourcing
- PeopleSoft Supplier Contract Management
- PeopleSoft Inventory
- PeopleSoft Catalog Management
- PeopleSoft eSupplier Connection
- PeopleSoft Order Management
- PeopleSoft Project Costing and Asset Management
- PeopleSoft Accounts Payable
- PeopleSoft General Ledger

RELATED SERVICES

The following services support Oracle PeopleSoft Purchasing

- Update Subscription Services
- Product Support Services
- Professional Services

Commitment Control

With PeopleSoft Purchasing, organizations can determine the availability of funds during the procurement process at requisition, purchase order (PO), and voucher creation. You can establish tolerance levels to enforce different levels of control for commitments, encumbrances, and expenditures against budgets. User security provides different levels of authority to indicate who can override funds and document tolerance exceptions. You also can commit funds against a budget during procurement activities. At year-end, you can close out remaining budgets or reestablish your commitments and carry forward to the next year.

Ease of Use for Buyers

With PeopleSoft Purchasing, we provide a Buyer WorkCenter to provide your purchasing users with a streamlined way of interacting with the Procurement system. The focus of most organizations is to do more with less. Procurement operations need to achieve objectives quickly and with high levels of accuracy and control. The key to achieving this goal is to increase the productivity of business users by enabling them to do their jobs efficiently, removing bottlenecks, and providing them with the right information at the right time. Operational users in all organizations perform different tasks on a daily basis that require them to access

various parts of the application quickly. The goal of the WorkCenter is to consolidate and centralize access to relevant data and to allow organizations to serve up work that needs to be completed by the user community.



Figure 1. The Buyer's WorkCenter provides users with the ability to manage all aspects of their daily tasks from one central location. The Buyer WorkCenter provides users with links to pages they use frequently, analytic data, reporting, and more without opening additional windows.

Flexible Purchase Order and Change Order Processing

Create complete POs independently or directly from requisitions, contracts, and bid awards. With PeopleSoft Purchasing, you can:

- Access and search online catalogs for all items or just those items defined from specific suppliers.
- Specify multiple shipping instructions per purchase order, multiple internal deliveries per shipment, and multiple accounting charges per delivery.
- Define your own change order criteria and automatically create change orders.
- View and dispatch purchase orders online. Dispatch orders to Suppliers directly from the system by a variety of methods: XML, EDI, fax, email, and print.
- Process backorders and reopen POs that may have been closed early.

Capture of Total Cost of Procurement

Manage the landed costs, such as freight, duty, and setup charges associated with each purchase. PeopleSoft Purchasing enables you to:

- Create user-defined costs such as freight, insurance, and duties related to the procurement of goods into your organization.
- Define freight calculation matrices for the automatic calculation of freight rates.
- Establish flexible defaulting rules to ensure that predictable charges always

appear by default in the purchase order.

- Assign miscellaneous charges to purchases automatically and manually.
- Determine which costs are expensed or included as “landed cost” components that affect inventory valuation.
- Compare estimated charges to actual charges invoiced by material or third-party Suppliers.
- Link third-party invoices for landed costs to the purchase orders that incurred the charges.

Sophisticated Workflow Approvals—Anytime, Anyplace

You can create sophisticated workflow rules for approval or notification within your organization—graphically and without coding—all from your desktop or mobile device. You can design Purchasing approvals 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 to 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 of requests, including detailed product information, cost distributions, attachments, and requester comments.
- Edit requests during the approval process.

Process Contracts and Agreements Online

PeopleSoft Purchasing enables you to establish enterprisewide Supplier Procurement Contracts. You can:

- Create open, category, and fixed item contracts.
- Establish corporatwide or business-specific contracts.
- Define flexible pricing rules for supplier contracts, including price adjustments for both shipping locations and quantities.
- Use approved contracts to create purchase orders
- Define contract releases that automatically generate and dispatch POs to contract suppliers.
- Establish payment milestones on a contract for progress payment schedules.
- Create one PO to track the life of a contract.

- Track contract changes with an audit trail of key contract transactional information to identify who made what change and when they made it.
- Use Contract Defaulting Options to default the contract onto the purchase order and requisition to reduce contract leakage. Contract price compliance is a key issue within organizations to ensure the contract price is actually used for payment.

Procurement Card Processing

To reduce the cost of small dollar purchases, PeopleSoft Purchasing supports the use of procurement cards. Use it to:

- Specify cardholders' defaults, including the cards they are authorized to see, their default general ledger account number, security, and spending limits.
- Designate certain merchants as preferred suppliers to enforce business policies regarding the use of preferred suppliers.
- Use Procurement Card as an automatic payment method on requisitions and POs.
- Designate a Supplier Ghost Card to use automatically for purchases.
- Audit inappropriate purchases using merchant category codes.
- Load bank statements automatically and reconcile banks statements and existing purchase orders.
- Review expenditures, override default accounts, add additional account distributions, add purchase item information, and track disputes.
- Leverage the voucher creation, commitment control, and payment processes in PeopleSoft Accounts Payable module.
- Load data and orders from VISA, MasterCard, and US Bank formatted files.

Workforce Mobilization

With the Procurement Operations Home Page delivered to a smartphone, tablet, or desktop, users are able to monitor key events in Procurement even while on-the-go. Built with the PeopleSoft Fluid User Interface, this new navigation paradigm enables users to monitor-by-exception approvals not performed with a stated best practices timeframe, Suppliers who are not performing to service level agreements, and quickly answer questions about Procurement spend even while in meetings. With access to their specific areas of interest, users are able to address issues effectively and proactively before they affect other areas of an organization.



Figure 2. Procurement Operations Home Page – Users on-the-go can monitor key Procurement activities from their personal devices

Integration with Other Applications

When you share common data structures, your whole organization can look at and use the same information at the same time. You can:

- Generate requisitions automatically from PeopleSoft Projects, PeopleSoft Order Management, and PeopleSoft Inventory.
- Automate invoicing and payment activities using our integration with PeopleSoft Accounts Payables. For example, you can generate vouchers for received goods and services, match vouchers and purchase orders and receipts, generate payments without waiting for invoicing using Evaluated Receipts Settlement (ERS) matching, and automatically generate debit memos for goods returned to a Supplier.
- Manage buy-side consignment inventory supplied by your suppliers and pay upon consumption with PeopleSoft Inventory and PeopleSoft Accounts Payables.
- Source requisitions from internal inventory stores using PeopleSoft Inventory.
- Respond quickly to fulfill sales orders for out-of-stock items with PeopleSoft Order Management.
- Charge procurement costs to specified projects.
- Streamline entry of asset information.

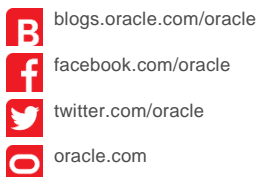
- Provide requisition information to PeopleSoft Strategic Sourcing for complex procurement actions or reverse auctions.



CONTACT US

For more information about PeopleSoft Purchasing, visit oracle.com or call +1.800.ORACLE1 to speak to an Oracle representative.

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Hardware and Software, Engineered to Work Together

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