

Oracle 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, which includes XML messages; electronic data interchange (EDI) transactions, emails, faxes, and item sourcing through electronic catalogs.

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 defaults 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 have the answers that you and your Supplier need. It provides the following capabilities:

- Sharing of Supplier information across business organizations.
- Segregating Supplier entry and approval processes to support governance, risk, and compliance controls.
- Tracking and monitoring of Supplier performance with user-defined classification codes.

Key Features

- Purchase order processing
- Procurement Contracts
- Commitment control
- Robust graphical workflow
- Supplier rebate processing
- Change control tracking and re-approval options
- Automatically substitute items
- 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
- Analytics Dashboard

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

- Managing 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 for raw materials, goods, and services. Use it to:

- Reduce contract leakage by allowing requesters to order only from authorized item categories.
- 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 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.

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 can also 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 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 with high levels of accuracy and control. The key to achieving this goal is to increase the productivity of business users, allowing 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 WorkCenter consolidates and centralizes access to relevant data and allows organizations to serve up work that needs to be completed by the user community.

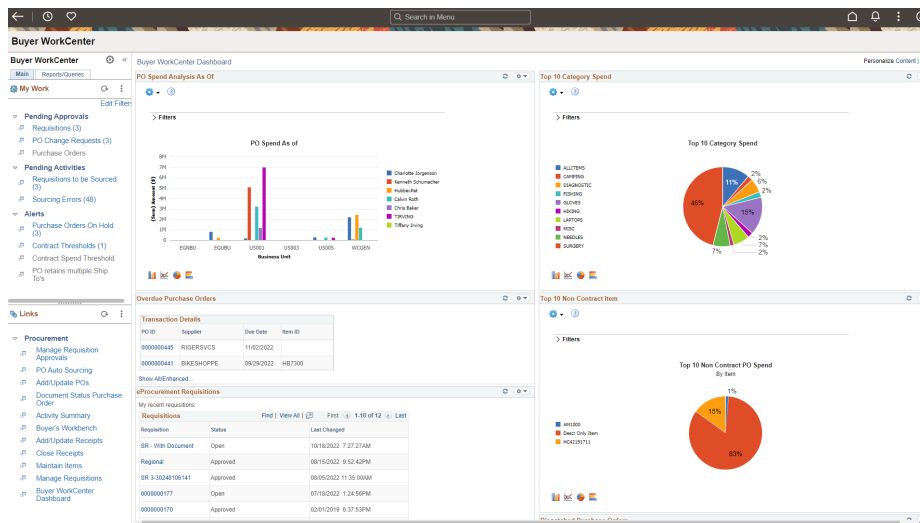


Figure 1. The Buyer WorkCenter provides the ability to manage all aspects of a buyer's daily tasks from one centralized location. The Buyer WorkCenter provides links to frequently used pages, analytic data, reporting, and more, without opening additional windows.

Flexible Purchase Order and Change Order Processing

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

- Access and search online catalogs for all items, or only 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 have been closed early.

Capture Total Cost of Procurement

Manage 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 on the purchase order.
- Assign miscellaneous charges to purchases automatic 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 to perform approvals while out of the office using a wireless device.
- Use sequential and non-sequential approval paths, or add approvers, reviewers, or both during the approval process.
- Authorize line item approval and re-approval for multiple line requests.
- View full request details, 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 enterprise-wide Supplier Procurement Contracts. You can:

- Create open, category, and fixed item contracts.
- Establish corporate-wide 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 purchase orders to contract suppliers.
- Establish payment milestones on a contract for progress payment schedules.
- Create one purchase order to track the life of a contract.
- Track contract changes with an audit trail of key contract transaction information to identify who made changes and when they made it.
- Use Contract Defaulting Options to default contract information onto a PO 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.
- Group Single or Multiple Supplier Contracts together for reporting purposes.

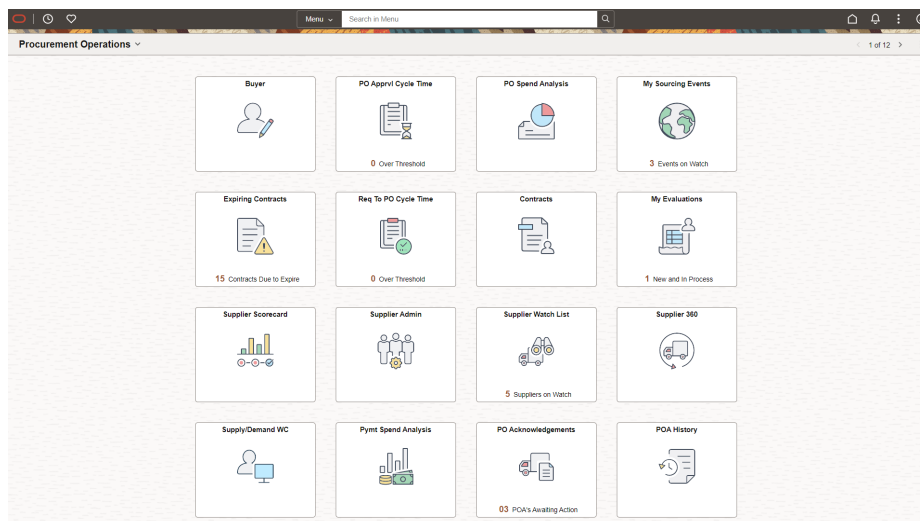
Procurement Card Processing

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

- Specify cardholder 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.
- Use Procurement Cards as an automatic payment method on requisitions and purchase orders.
- 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 using PeopleSoft Accounts Payable.
- Load data and orders from VISA, MasterCard, and US Bank formatted files.

Workforce Mobilization

With the Procurement Operations Home Page available on a smartphone, tablet, and desktop, users can monitor key events in Procurement 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 specific areas of interest, you can address issues effectively and proactively before affecting other areas of your organization.



Related Products

These 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
- PeopleSoft Maintenance Management

Related Services

These services support Oracle PeopleSoft Purchasing:

- Update Subscription Services
- Product Support Services
- Professional Services

Figure 2. User's on-the-go can monitor key procurement activities from their personal device.

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, Order Management, Maintenance Management, and Inventory.
- Automate invoicing and payment activities using integration with PeopleSoft Accounts Payables. For example, you can:
 - Generate vouchers for received goods and services.
 - Match vouchers, purchase orders and receipts.
 - Generate payments without waiting for invoicing using Evaluated Receipts Settlement (ERS) matching.
 - Automatically generate debit memos for goods returned to a supplier.
- Manage buy-side consignment inventory supplied by your suppliers and pay upon consumption using PeopleSoft Inventory and 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 the entry of asset information.
- Provide requisition information to PeopleSoft Strategic Sourcing for complex procurement actions or reverse auctions.
- Award Events from PeopleSoft Strategic Sourcing to a purchase order or procurement contract.

Analytics Dashboard

PeopleSoft Purchasing provides multiple visualizations for procurement managers, buyers, and contract administrators. They provide a unique view to:

- Spot supplier delivery and quality performance.
- Find opportunities to negotiate better payment terms.
- Monitor purchase volume (Business Unit, Supplier, Trend by Period).
- Isolate purchase orders that need attention.
- Identify past due deliveries.
- Distinguish between contract versus non-contract spend.
- Detect contracts due to expire.
- Recognize contract compliance throughout the organization.

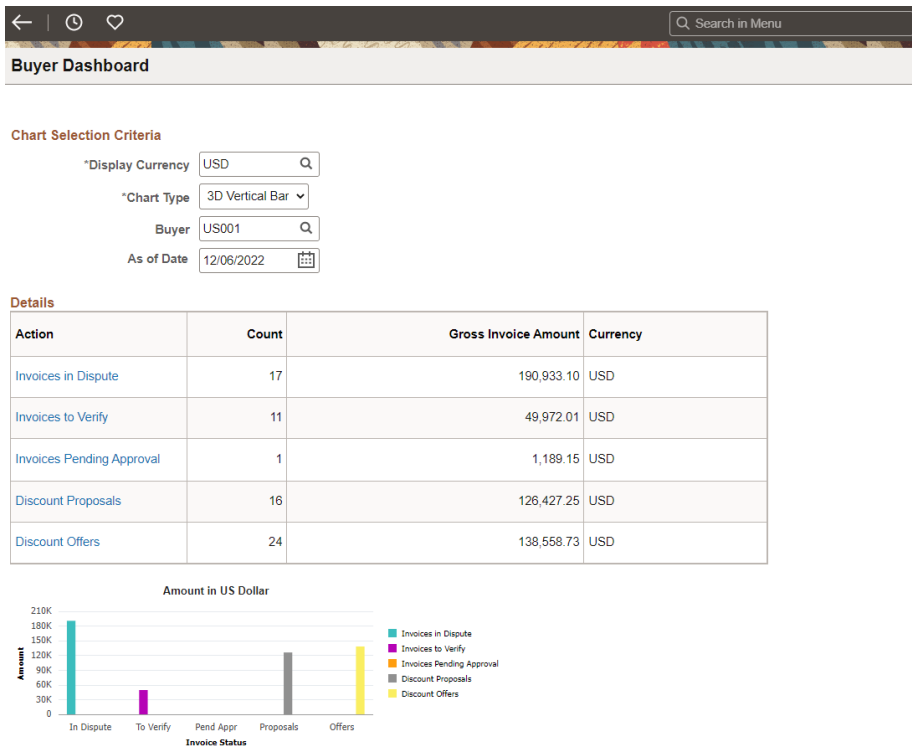


Figure 3. Buyer Dashboard provides overall invoice and payment status with worklists, charts, and drill-downs.

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