

# Oracle PeopleSoft eProcurement

Oracle's PeopleSoft eProcurement provides a modern, consumer-grade shopping experience for your requesters to view and compare items from internal inventory, punchout suppliers, and hosted marketplaces, in one place. In addition, requesters can order services, special requests, use custom forms, with a fully tailored experience based on unique roles.

Requesters are guided to compliant items from preferred suppliers with prices based on pre-defined contracts, which are automatically assigned during the requisition process, ensuring reduced spend and minimizing requisition to approval cycle times.

## Control of All Spend

PeopleSoft eProcurement streamlines processes using intuitive pages and powerful search capabilities to guide requesters through the steps of procurement. It enables:

- Deployment of common procurement functionality for the entire organization.
- Dramatic reduction of processing, material costs, and inventory levels.
- Leveraging spend to negotiate better contracts with suppliers.
- Real-time access and validation, including on-hand inventory quantities.
- Manual or automatic selection of valid Item substitutes based on pre-defined choices.

## Universal Request Processing

Designed for a wide variety of users (from casual to power user), PeopleSoft eProcurement enables you to distribute intuitive self-service procurement throughout your organization. You can:

- Provide a single source across the enterprise to order products.
- Use the Catalog Browser or robust Oracle Search to quickly find the right item.
- Access third-party content management Suppliers and Marketplaces using punchout and view the results on a single eProcurement checkout page.
- Highlight the best value items based on contracts, preferred suppliers, or recommendations, and obtain a real-time price and availability before submitting the request.
- Compare products side by side to select the right one for you.

## Key Features

### Key Business Benefits

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

### Key Business Features

- Provides a self-service procurement solution for the entire organization
- Allows a Role-based personalization of the user experience
- Provides powerful and flexible search capability
- Supports Workflow approvals anytime, anyplace
- Use Procurement cards to manage spend
- Support mobile requisitioning using a Tablet or Smartphone
- Enables Seamless punch-out to suppliers and marketplaces
- Provides Industry specific features including Bill Only and Bill and Replace flows

- Enter a special request for unique, or one-time, purchases.
- Request items seamlessly from inventory locations and query inventory levels before submission.
- Use powerful and configurable express forms to gather the details that are related to complex requests.
- Maintain, group, and share favorite item lists and templates by requester.
- Leverage Order Sheets during requisition entry with pre-defined shipping and accounting information reducing user error.
- Specify delivery to multiple locations and delivery schedules for each line item, multiple accounting charges per delivery, and one-time shipping locations.
- Properly charge the correct department, accounts, and projects.

## Powerful Search Tools with Deep Integration

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

- Select, compare, and order items and services from secure, role-based, online catalogs that are tailored to their role in the organization.
- Use synonyms, match case, and Boolean logic to easily find items that meet their criteria.
- Perform parametric search on attributes that are registered to a category.
- Perform robust searches across catalogs, favorites, web suppliers, templates and forms. Catalogs can be displayed in a list or tile view and can be filtered with user-defined facets.
- View attributes displayed on the search row, which provides unique insight into real-time data including inventory availability, contract information, substitute items, and preferred suppliers.

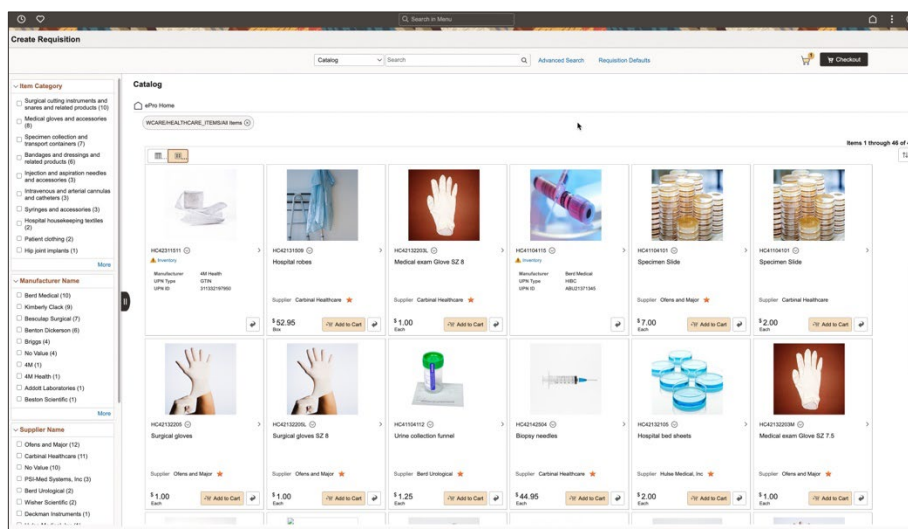


Figure 1. Search results in Tile view with facets

## Quick Budget Checking and Commitment Control

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

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

## Leverage Powerful Industry Specific Features

PeopleSoft eProcurement supports multiple industries including Public Sector, Financial Services, and Healthcare. It also provides:

- Support for UPNs and GTINs throughout the requisition and other Procure to Pay processes ensuring full compliance with GS1 standards.
- Support for requisition types of 'Bill Only' and 'Bill and Replace' allowing you to capture surgery and item information from Electronic Health Systems (EHR) on the requisition and purchase order and use that information when transmitting it to related suppliers.

## Seamless Switching of Devices Throughout eProcurement Flows

PeopleSoft eProcurement fully supports responsive design so that, no matter what device you're using, the user experience is optimized for that device

From Checking out on a tablet:

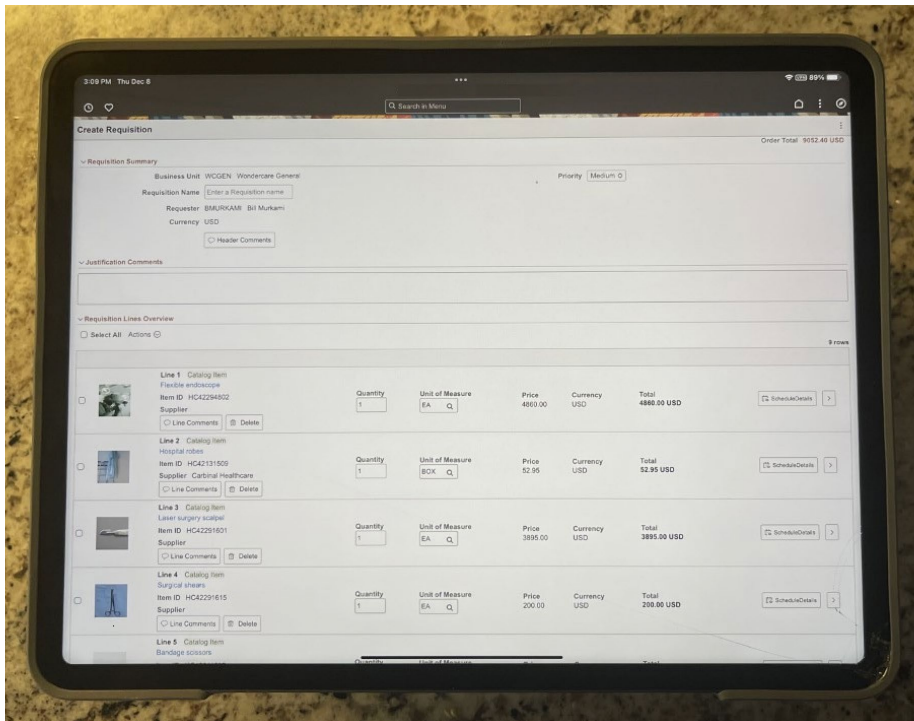


Figure 2. Create requisitions using a tablet.

To reviewing the Shipping and Accounting information on the Desktop:

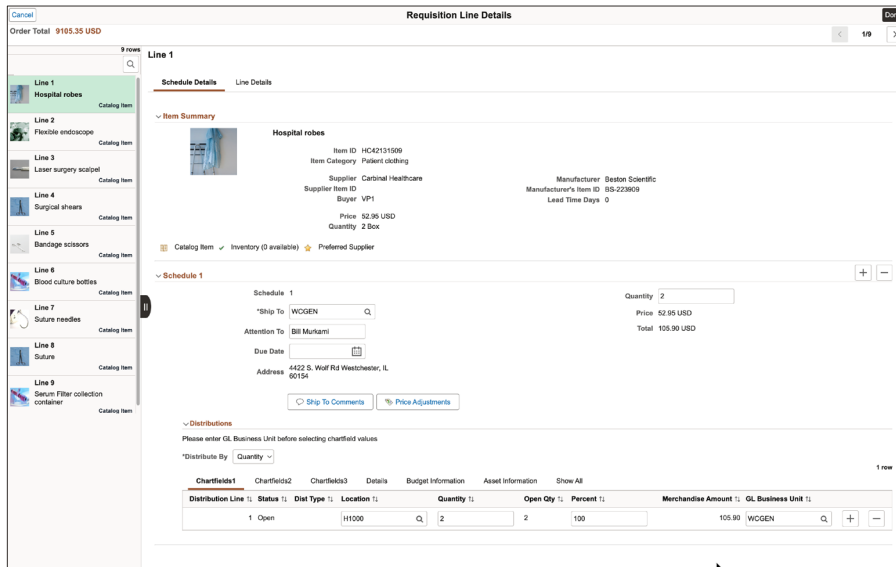


Figure 3. Review requisition line details on your desktop.

To submitting the Requisition on the smartphone:

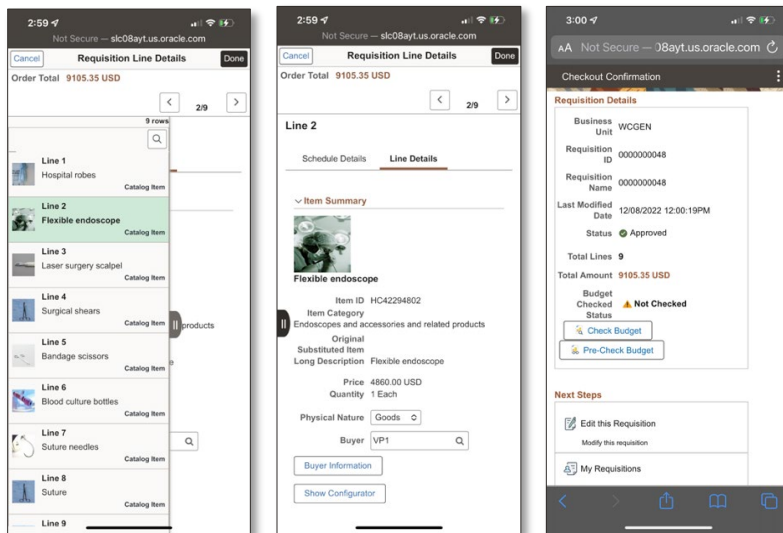


Figure 4. Submit requisitions using a smartphone.

PeopleSoft eProcurement has you covered, and even if your browser times out or your mobile window is closed, all of the data in the requisition is automatically saved and never lost.

## Real-Time Tracking and Complete Requisition Management

PeopleSoft eProcurement gives you a graphical 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 a graphical display of each step in the process.
- View resulting purchase order details and material stock requests for items that are being sourced from inventory.
- Access online receipts and view receipt history.
- View delivery details and proof of delivery.
- Issue change requests.
- Return items to suppliers for credit, exchange, or replacement.

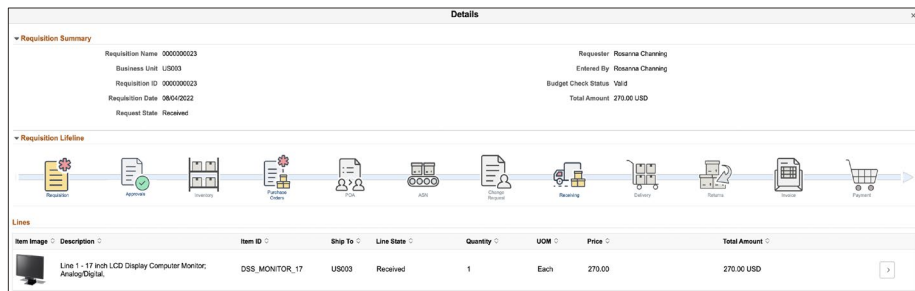


Figure 5. Requisition lifecycle showing real-time progress of the Requisition

## Change Request Tracking, Audit Trail, 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 PeopleSoft eProcurement requisitions. Buyers, requesters, and managers can view the audit trail of changes to eProcurement requisitions at any time. The application tracks 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 may not be required for deliver location changes.

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

## Sophisticated Workflow Approvals – Anytime, Anyplace

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

- Configure workflow approvals based on criteria appropriate for your organization.

### Related Products

The following Products support Oracle eProcurement

- PeopleSoft Purchasing
- PeopleSoft Order Management
- PeopleSoft Services Procurement
- PeopleSoft Supplier Contract Management
- PeopleSoft Inventory
- PeopleSoft Catalog Management
- PeopleSoft Human Capital Management
- PeopleSoft Project Costing and Asset Management
- PeopleSoft Maintenance Management
- PeopleSoft Accounts Payable
- PeopleSoft General Ledger

### Related Services

The following services support Oracle eProcurement:

- Update Subscription Services
- Product Support Services
- Professional Services

- Receive approval notification through email, a worklist item on the portal, or a wireless device, and 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 the details of requests, including detailed product information, cost distributions, attachments, and requester comments.
- Edit requests during the approval process.

## 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 Human Resources.
- **Payables.** Populate PeopleSoft Payables vouchers from eProcurement purchase orders; perform matching validation among receipts, purchase orders, and invoices; generate debit memos automatically with Payables for goods returned to the supplier.
- **Inventory.** Load inventory items into your catalog for internal catalog items, view inventory levels, and allocate inventory from a requisition.
- **Project Costing and Asset Management.** Charge requests to PeopleSoft Project Costing for full project accounting; identify assets for tracking and workflow approval.
- **Supplier Contract Management.** Create a supplemental request document that captures information pertaining to a contract request.
- **Maintenance Management.** Maintenance technicians can link work orders to requisitions by initiating the creation of the requisition from the work order, or by linking back to the work order from the requisition.
- **Order Management.** Order Management can create requisitions as supply, or peg to incoming requisitions to satisfy the order demand.
- **Other.** Operate the system as a standalone application, or integrate with legacy systems.

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