# PeopleSoft eProcurement

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Oracle's PeopleSoft eProcurement, an integral component in Oracle's PeopleSoft 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.

## Control of All Spend

PeopleSoft eProcurement is a web-based solution that is 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 the 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.
- Optimized for use on smartphone or tablet device for on-the-go access.

## 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 that you organize your business.
- Manage eProcurement information by using user-friendly 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 a personalized user experience easily.
- Empower functional personnel by letting them maintain their own Workflow

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activities, catalog maintenance, and requests. Scarce IT resources are now available for you 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 by using a simple requisitioning process that can be personalized.

- Use the Catalog Browser or robust Secure Enterprise Search (SES) to find the right item quickly.

- Access third-party content management Suppliers without a change in the user experience. Search results from Marketplace are returned and viewed on a single eProcurement page.

- Highlight the best value items based on contracts, preferred suppliers, or recommendations, and obtain real-time price and availability before submitting the 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 seamlessly from inventory locations and query inventory levels before submission.

- Use powerful Express forms to gather full details that are 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 provides a powerful and flexible searching capability to find the exact item that 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 that meet requesters' criteria easily.

- Parametric search on attributes that are registered to a category.

- Robust search functionality provided by Oracle's Secure Enterprise Search
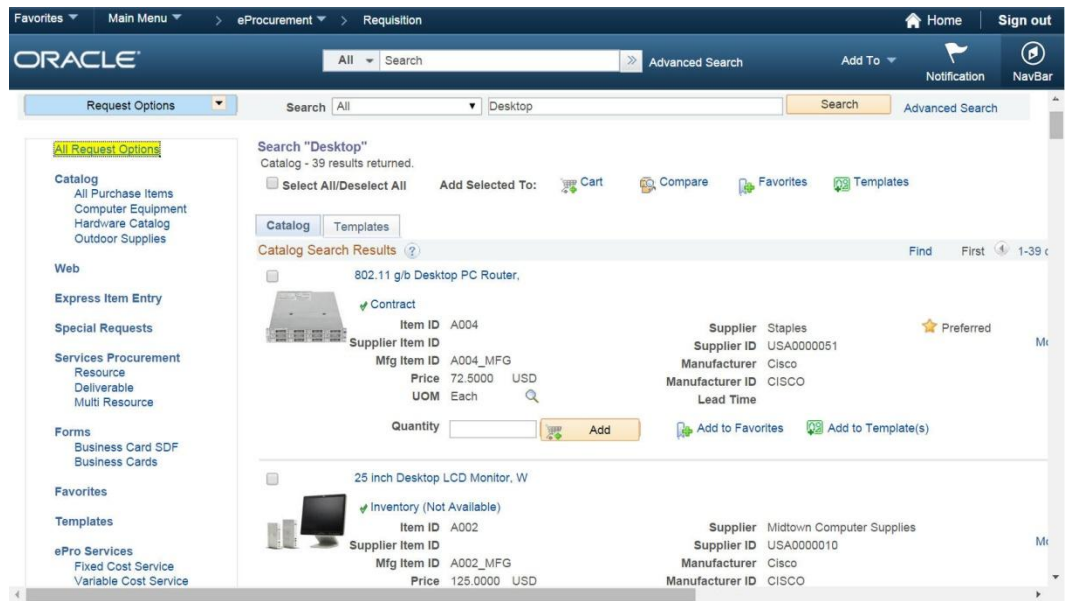
(SES) with user-defined faceted search results.



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

## 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 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 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.

## 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 noncompliant requisitions.

## 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.



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

## 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. 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 may not be required for changes to the delivery location.

The application automatically initiates a PO Change Request if the requisition is already sourced. The 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.

## Workforce Mobilization

PeopleSoft eProcurement provides a streamlined user experience for workers on-the-go with mobile requisitioning available on smartphones and tablets. Offering an easy-to-use web experience, users connect to the eProcurement system and are able to browse catalogs, access their Favorites, and interact with the system much as they would on popular consumer shopping sites.
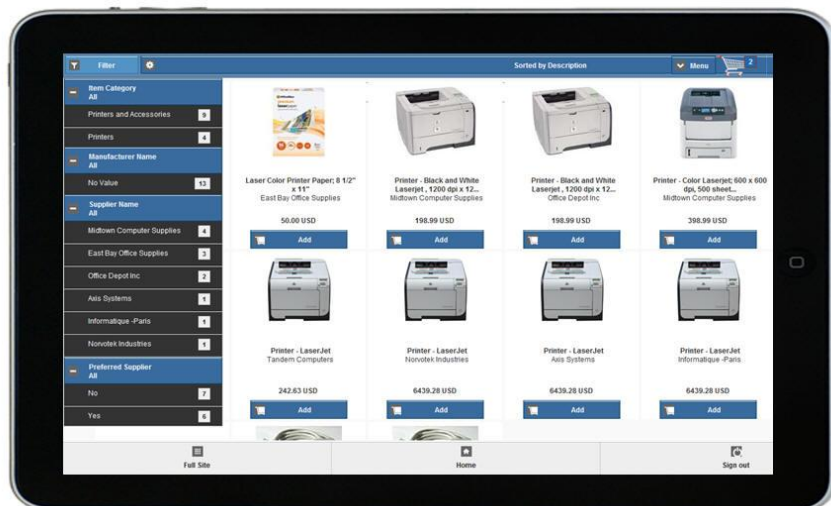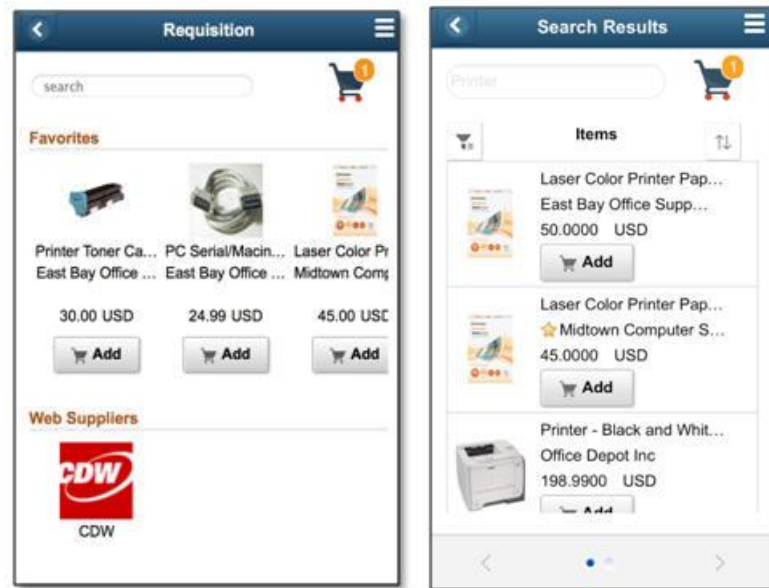
Figures 3 and 4. For Mobile eProcurement, the mobile version of the Manage Requisitions search page on the tablet and smartphone gives requesters an at-a-glance view of which items match their search criteria and allows them to drill down to further details.

## 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.

- **Accounts Payable**. Populate PeopleSoft Accounts Payable vouchers from eProcurement purchase orders; perform matching validation among receipts, purchase orders, and invoices; generate debit memos automatically with Accounts Payable for goods returned to the supplier.

- **Inventory**. Load inventory items into your catalog for internal catalog items, ability to view inventory levels, and allocation of inventory from the requisition.

- **Project Costing and Asset Management**. Charge requests to Oracle's PeopleSoft Project Costing 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 a contract request.

- **Services Procurement**. Access the only true end-to-end solution for ordering goods and services from the same requisition when integrating with

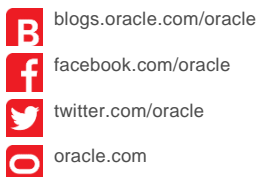Oracle's PeopleSoft Services Procurement.

- **Other**. Operate the system as a standalone application or for implementation with legacy systems.

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**Hardware and Software, Engineered to Work Together**

Oracle is committed to developing practices and products that help protect the environment