



Functional Course

PeopleSoft v9.2 Strategic Sourcing

Financials Supply Chain Management (FSCM)

Developed for implementation team members and functional end users, PeopleSoft Strategic Sourcing v9.2 training quickly introduces students to the set-up considerations, configuration, and transactional processing components of the Strategic Sourcing module. Through scenarios, real-world experiences from implementers, and hands-on activities, students gain an understanding of how to establish process and report on transactions.

Prerequisites:

- PeopleSoft v9.2 Foundations (FSCM)

Overview

- Strategic Sourcing Overview
- Business Process Overview

Configurations

- Installation Options

TableSet IDs

- Define TableSet IDs
- Define TableSet Controls

User Preferences

- Strategic Sourcing Options
- Procurement – Vendor Processing Authority
- Procurement – Contract Process
- Request for Quote Process

Auto Numbering

File Locations

Standard Comments

- Standard Comment Types
- Standard Comments

Define Business Units

- Purchasing Definition
- Strategic Sourcing Definition

Complete Purchasing Options

- Buyer Setup

Bid Factor Setup

- Bid Factor Setup
- Bid Factor Group Setup

Constraints Setup

- Constraints - IT

Reason Codes Setup

- Reason Codes - IT

Vendor User Setup

- Vendor User – IT Security

Approval Workflow Setup

- Role Definition – IT

Agenda

Approval Workflow Setup (cont'd)

- User List Definition - IT
- Approval Workflow Setup - IT
- Definition criteria - IT
- Path Criteria - IT
- Step Criteria - IT
- Assign Approval by Business Unit - IT
- User Profile Setup - IT

Workbook Sign-Off

Strategic Sourcing Steps

- Create an Event from a Sourcing Template
- Add Bidders to an Event
- Modify the Header Bid Factors
- Add Additional Lines to an Event
- Modify Event Settings and Options
- Add Event Collaborators
- Collaborate on an Event
- Approve or Deny an Event
- Add and Attachment to an Event
- Award a Bid
- Award a Single Event to Multiple Bidders