

PeopleSoft v9.2 Purchasing

Financials Supply Chain Management (FSCM)

Developed for implementation team members and functional end users, PeopleSoft Purchasing v9.2 training quickly introduces students to the set-up considerations, configuration, and transactional processing components of the PO 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)

Purchasing Building Blocks

- Using PeopleTools Setup Manager in PeopleSoft v9.2
 - Manage Implementation Projects
- Purchasing Business Unit Set Up and Configuration
 - Purchasing Processing Options
 - Purchasing Business Unit Definition
 - eProcurement Business Unit Options
- Purchasing Configuration Value Set Up
 - Locations
 - Units of Measure
 - Freight Terms
 - Ship Via Codes
 - Ship to Codes
 - PO Origin Codes
 - Buyers
 - Requesters
 - User Preferences
 - Standard Comment Types
 - Standard Comments
 - Vendor Set Controls
 - Contract Set Controls

Purchasing Building Blocks (cont'd)

- Purchasing Configuration Value Set Up
 - RFQ Required Rule
 - Change Order Template
 - Match Rules
 - Match Rule Controls
 - Category Codes
 - Item Numbering Control
- Vendor Set Up
 - Vendor Identifying Information
 - Vendor Addresses
 - Vendor Locations
 - Vendor Contracts
 - Maintain Vendors
- Items
 - Item Definition
 - Item Purchasing Attributes
- Item Catalog Set Up
- Purchasing Contracts
 - Open Item Contracts
 - Line Item Contracts
 - Other Contract Options

Procurement Processes

- Creating Requisitions
 - Enter Requisitions using the Item Catalog
 - Enter Special Request Requisitions
 - Create Requisitions Using Templates and Favorites
 - Using Manage Requisition Page
- Create Purchase Orders from Approved Requisitions
 - Create Purchase Orders using Requisition Expediter
 - Create Purchase Orders using PO Auto Source Process Batch Process
- PO Maintenance
 - Enter PO Header Information
 - Enter PO Line Information
 - Enter PO Schedule Line Information
 - Enter PO Distribution Line Information
 - Dispatch PO from The PO Page
- Dispatch Purchase Order
 - Batch Dispatch Process
- Changing and Canceling Purchase Orders
 - Create Change Order Using a Change Request
 - Approve Change Request and Build a Change Order
 - Create Change Orders Online
 - Cancel Purchase Orders

Procurement Processes (cont'd)

- Receiving
 - Receive from Manage Requisition Page
 - Receive Purchase Order from Manage Receipts Page
 - Cancel Receipt
 - Return to Vendor Processing

Inquiries and Reports, and Other Topics

- Inquiries and Reports
 - Purchasing Delivered Inquiry Screens
 - Purchasing Delivered Reports
- Other Topics
 - Requisition Workflow
 - Voucher Matching