



# Functional Course

## 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

## Purchasing Building Blocks (cont'd)

- Standard Comments
- Vendor Set Controls
- Contract Set Controls
- 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

## Purchasing Building Blocks (cont'd)

- 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

## Procurement Processes (cont'd)

- 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
- 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