

# PeopleSoft Purchasing Rel 9.2 Ed 2

## Course Topics

- **The Purchasing Business Process Overview**
  - The PeopleSoft Purchasing Business Process Flow and Functionality
  - The Integration Points Between PeopleSoft Purchasing and other PeopleSoft Applications
  - The Default Hierarchy
  - Buyer WorkCenter
  - Buyer WorkCenter Dashboard
- **Establishing Business Units and Processing Options**
  - Defining Installation Parameters
  - Creating a PeopleSoft Purchasing Business Unit
- **Setting Up Required Table Information**
  - Creating Locations
  - Adding Ship To Locations
  - Setting Up User Preferences
  - Setting Up Requesters
  - Setting Up Buyers
- **Determining Supplier Basics**
  - Configuring the Supplier Set Control Page
  - Establishing Supplier Processing Authority
  - Searching for a Supplier
  - Adding a New Supplier
- **Updating Approving and Inactivating Suppliers**
  - Updating and Reviewing Supplier Name History
  - Approving Suppliers
  - Inactivating Suppliers
  - Using the Supplier Administration Center

- **Processing Supplier Onboarding**
  - Supplier Onboarding
- **Using the Approval Framework**
  - The Approval Framework
  - Setting Up Purchasing for Use with the Approval Framework
  - Setting Up Workflow Approvals
- **Creating Requisitions**
  - The Requisition Business Process Flow
  - Requisitions
  - Creating Requisitions Online
  - Managing the Requester's Workbench
  - The Process to Load Requisitions from Other Applications
- **Managing Approvals**
  - Managing Approvals
  - Editing Requisitions
  - Delegating Responsibility
  - Monitoring Approvals
- **Sourcing Requisitions and Creating Purchase Orders**
  - Sourcing
  - Sourcing Requisitions Online
  - Sourcing Requisitions by Using the Autoselect Requisitions Process
  - Building Inventory Demand
  - Using the Sourcing Workbench Component
  - Identifying Sourcing Methods
  - Configuring the PO Calculations Process and Configuring the PO Create Process
  - The Purge Stage Tables Process
- **Managing Purchase Orders**
  - The Purchase Order Business Process and Structure
  - Creating and Updating Purchase Orders

- Creating a Purchase Order by Copying from Another Document
- Using the Buyer's Workbench
- Evaluating Options to Dispatch Purchase Orders
- Mass Buyer Changes
- Advanced Purchase Order and Requisition Line Search
- **Demonstrating Receiving**
  - The Receiving Business Process
  - Identifying Receiving Setup Information
  - The Receiver Workbench
  - Defining Receipt Statuses
  - Creating a Receipt with a Purchase Order
  - Creating a Receipt Without a Purchase Order
  - How Purchasing Receipts Interface with PeopleSoft Applications
  - The Receipt Accrual Process
  - Purchase Order Change Templates
  - Creating Change Orders for Purchase Orders
  - Viewing Purchase Order Change Order History
  - The Change Order Request Process
  - Distinguishing Between Purchase Order Cancellations and Deletions
  - Deleting a Purchase Order
  - Requisition Change Tracking
  - Requisition Deletion
- **Configuring Additional Procurement Options**
  - Describing Distribution Networks
  - Setting Up Miscellaneous Charges/Landed Costs and Templates
  - Combining Miscellaneous Charges with Items or Purchase Orders
- **Setting Up Sales and Use Tax**
  - Setting Up Sales and Use Tax

- **Maintaining Price Adjustments**
  - Setting Up Supplier Price Adjustment Rules
  - Setting Up Purchase Order Schedule Price Adjustments
- **Creating and Using Purchasing Contracts**
  - Defining Contract Set Controls
  - Explaining Master Contracts
  - Creating Purchasing Contracts
  - Generating Contract Purchase Orders
  - Explaining Blanket Purchase Orders