

Purchasing – New Requester Training

ORACLE®

PEOPLESOFT





Agenda

- Welcome! – Review Agenda
- Introductions
- Role of the Mentors
- The Purchasing Decision Flowchart
- Swim-lanes for Requisitions
- Practice - Log in and log out of the system (Test Environment)
- Handouts of Quick Reference Guides
- Introduction to UPKs
- Best UPKs for New Requesters
- How to create a Requisition – Small Cost
- How to create a Requisition – SW Contract
- How to create a Purchase Order
- Accounts Payable
- Asset Management
- Questions & Answers
- Next Steps



Introductions



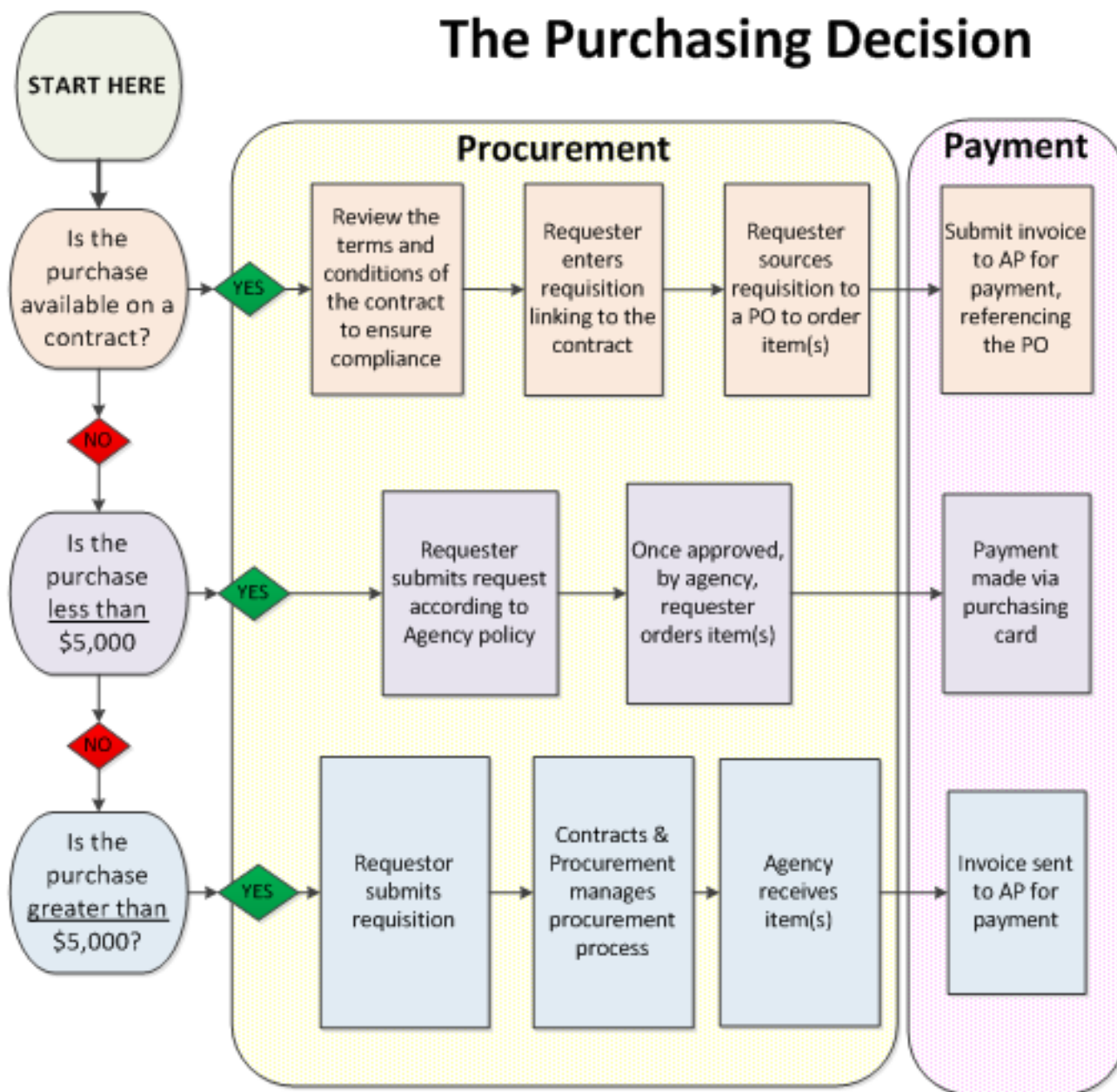
1. Area working –
2. Experience with PeopleSoft
3. Years with Salt Lake County
4. Favorite Book or Favorite Movie

Role of the Mentors

1. Experience with PeopleSoft
2. Speak in layman's terms
3. Direct help:
 - Requisitions
 - Purchase Orders
 - Receipts
4. Responsive
5. Familiarity with UPKs



The Purchasing Decision



Policies

Small Cost Purchases

- For purchases less than \$5,000
 - Quotes not required (but encouraged)
- See Policy 7021*

Purchasing Cards

- Less than \$5,000 per transaction
 - No sales tax
 - No use by anyone except cardholder
- See Policy 7035*

State / Cooperative Agreements

- Follow requirements of state or cooperative contract
- See Policy 7020*

Purchases to be Conducted by Contracts & Procurement

- All procurement over \$5,000 without contract
 - Expedited RFP (under \$25,000)
 - Full RFP
 - Sole Source/Exemptions
- Policy 7010, 7030*

Swim-lane - Process Review – Small Cost Reqs



Requester / Agency	1. Enters Req info into PS. (Req Name = "SM - ", Supplier, Category, Description, Accounting Info, Line Detail Info, Shipping info etc)		3. Source the Req to a PO (budget check the req)	4. Dispatches PO to Supplier		6. Receives product in PS
Approver		2. Approves Req				
Buyer						
Bidders / Suppliers					5. Receives emailed PO	
Contracts						6

Swim-lane - Process Review –Contract Purchas



Requester / Agency	1. Enters Req info into PS. (Req Name = "SW - ", Supplier, Category, Description, Accounting Info, Line Detail Info, Shipping info etc)		3. Source the Req to a PO (budget check the req)	4. Dispatches PO to Supplier		6. Receives product in PS
Approver		2. Approves Req				
Buyer						
Bidders / Suppliers					5. Receives emailed PO	
Contracts						

Swim-lane - Process Review – RFP – “BID”



Requester / Agency	1. Enters Req info into PS. Sets Supplier to "BID" and provides draft RFP/Specs to C&P	3. Provides RFP document & Notification Letter to C&P buyer and agency attorney if necessary	5. Reviews RFP Packet and obtains Department Director approval					14. Delivers Agreement to Supplier for signature		19. Receives Signed Contract - Sends to Supplier	
Selection Committee				9. Reviews / Evaluates Proposals	10a. Interviews and Scores Finalists						
Agency Approver	2. Approves Req										
Buyer		4. Receives & Prepares RFP Packet		6. Posts RFP and Issue Notification	8. Prepares Committee Packets, Reviews / Evaluates Proposals	10. Facilitates Scoring and Interviews	11. Prepares Recommendation for Mayor's Approval	12. Prepares Agreement Request for Attorney			21. Cancels Original Req
Bidders / Suppliers				7. Responds to RFP Solicitation		10c. Interviews (if necessary)		15. Signs Contract and returns to County		20. Receives Signed Contract and begins work	
Contracts									16. Sends contract to Mayor for signature	18. Enters Executed Contract in SIRE and PS - sends copy to Agency	
Attorneys		3a. Reviews RFP document						13. Prepares Agreement and Sends to Agency			
Mayor						12. Approves Recommendation			17. Signs Contract		

Logging Into the System



PeopleSoft®

PeopleSoft Project

- ▶ Home
- ▶ Fact Sheets
- ▶ FAQs
- ▶ Glossary of Terms
- ▶ Crosswalks
- ▶ Handouts / Presentations
- ▶ User Tools
- ▶ Contact
- ▶ eConnect Home
- ▶ PeopleSoft UPKs

PeopleSoft UPK Training

Access Training Modules

PeopleSoft Portal

Enter Here



[New! Instructions for allowing pop-ups in Chrome](#)

In 2012, Salt Lake County selected Oracle's PeopleSoft software to replace the current purchasing, payroll, finance, and HR systems. Cherry Road Technologies is the company that was selected to partner with Salt Lake County in the implementation process.

What will PeopleSoft do?

(TEST) <http://slcpswebfin1-t.slcounty.org:8000/psp/SLFT92/EMPLOYEE/ERP/?cmd=logout>

Quick Reference Guides

- Small Cost
- Link a Contract to a Requisition
- Solicitation Request



Logging Into the System



SL
SALT LAKE
COUNTY

CHANGE IS COMING

PeopleSoft

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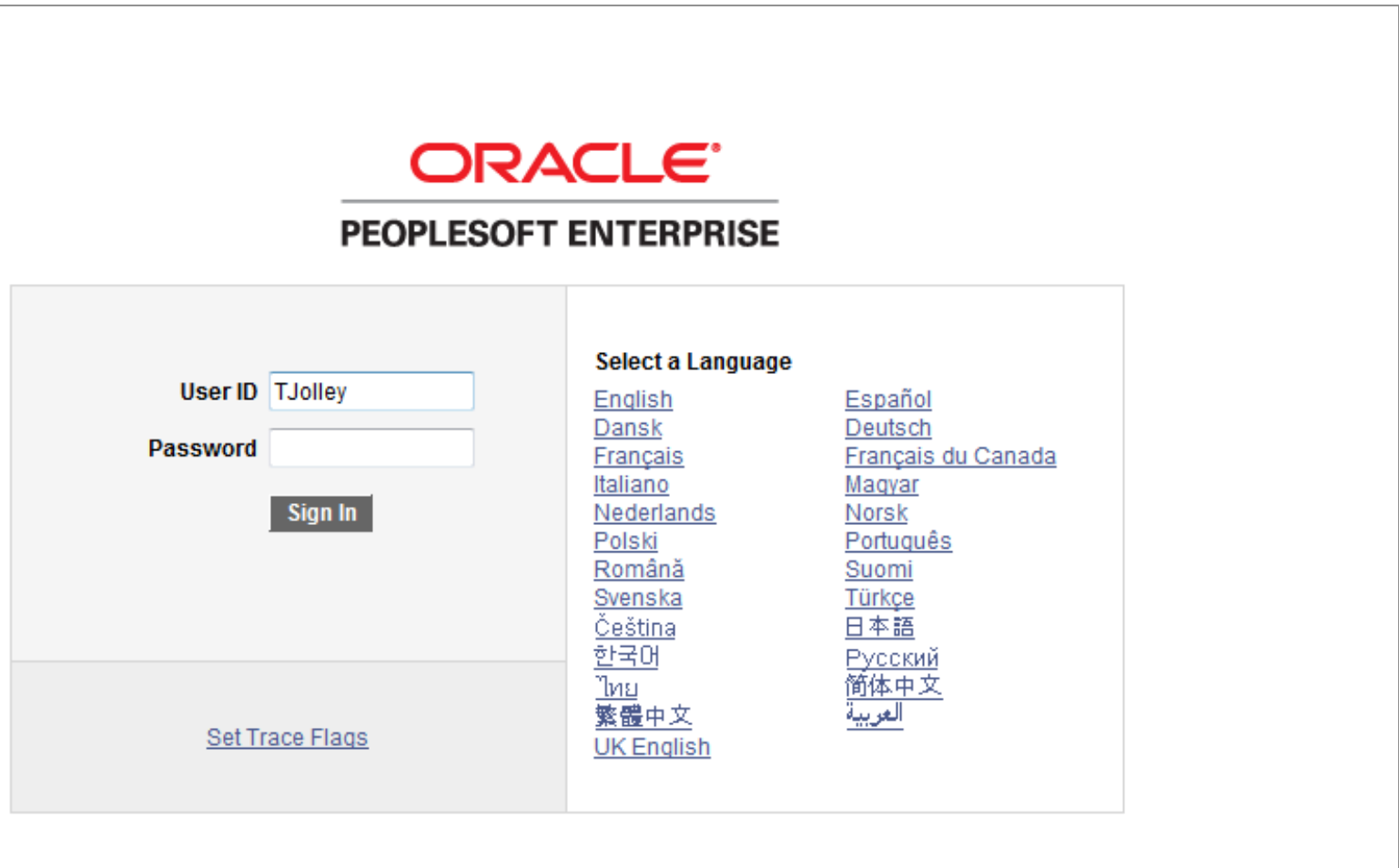
What will PeopleSoft do?

Best UPKs for New Users

Area	Folder	UPK Name	Comments
ePro Requesters	Creating Requisitions	Create a Small Cost Requisition	
ePro Requesters	Creating Requisitions	Create a Requisition for RFB/RFC	
ePro Requesters	Creating Requisitions	Create a Requisition for RFB for Capital Asset	
ePro Requesters	Creating Requisitions	Create a Requisition for RFP	
ePro Requesters	Creating Requisitions	Create an Exemption Request for a Sole Source	
ePro Requesters	Creating Requisitions	Manage Requisitions	Will show you all the information available from this one screen
ePro Requesters	Creating Requisitions	Cancel a Requisition	
ePro Requesters	Creating Requisitions	Edit a Requisition	
ePro Requesters	Creating Requisitions	Receive a Purchase Order	How to receive an item before AP can make payment (note: services that have been marked with "Amount Only" do not need to be received)
ePro Requesters	Creating Requisitions	Change an Account after the Requisition is saved	
ePro Requesters	Creating Purchase Orders	Expedite a Requisition to a PO	This is actually the first step to creating a PO started on the Manage Requisitions screen
ePro Requesters	Creating Purchase Orders	Create a Small Cost PO	
ePro Requesters	Creating Purchase Orders	Create a PO for a Contract Purchase	
ePro Requesters	Creating Purchase Orders	Expedite a Req for a Supplier with Multiple Locations	Choosing the correct location for a supplier with multiple addresses is vital in getting payment sent to the correct place
ePro Approvers	Approving Requisition	Approve a requisition	
ePro Approvers	Approving Requisition	Deny a requisition	
ePro Approvers	Approving Requisition	Approval - Hold a requisition	
ePro Approvers	Approving Requisition	Approval - Pushback Requisition	

How to create a Requisition – Small Cost

[PS - Test Link](#)



The image shows the Oracle PeopleSoft Enterprise login interface. At the top, the Oracle logo is displayed in red, followed by the text "PEOPLESOFT ENTERPRISE" in black. Below this, there is a login form with two input fields: "User ID" containing the text "TJolley" and "Password" which is empty. A "Sign In" button is positioned below the password field. To the right of the login form, there is a "Select a Language" section with a list of language options: English, Dansk, Français, Italiano, Nederlands, Polski, Română, Svenska, Čeština, 한국어, ไทย, 繁體中文, UK English, Español, Deutsch, Français du Canada, Magyar, Norsk, Português, Suomi, Türkçe, 日本語, Русский, 简体中文, and العربية. At the bottom left of the login form area, there is a link for "Set Trace Flags".

How to create a Requisition – SW Contract

[PS - Test Link](#)

ORACLE
PEOPLESOFT ENTERPRISE

User ID

Password

Sign In

[Set Trace Flags](#)

Select a Language

English	Español
Dansk	Deutsch
Français	Français du Canada
Italiano	Magyar
Nederlands	Norsk
Polski	Português
Română	Suomi
Svenska	Türkçe
Čeština	日本語
한국어	Русский
ไทย	简体中文
繁體中文	العربية
UK English	

How to create a Purchase Order

[PS - Test Link](#)

ORACLE[®] PEOPLESOFT ENTERPRISE

<p>User ID <input type="text" value="TJolley"/></p> <p>Password <input type="password"/></p> <p><input type="button" value="Sign In"/></p>	<p>Select a Language</p> <table><tr><td>English</td><td>Español</td></tr><tr><td>Dansk</td><td>Deutsch</td></tr><tr><td>Français</td><td>Français du Canada</td></tr><tr><td>Italiano</td><td>Magyar</td></tr><tr><td>Nederlands</td><td>Norsk</td></tr><tr><td>Polski</td><td>Português</td></tr><tr><td>Română</td><td>Suomi</td></tr><tr><td>Svenska</td><td>Türkçe</td></tr><tr><td>Čeština</td><td>日本語</td></tr><tr><td>한국어</td><td>Русский</td></tr><tr><td>ไทย</td><td>简体中文</td></tr><tr><td>繁體中文</td><td>العربية</td></tr><tr><td>UK English</td><td></td></tr></table>	English	Español	Dansk	Deutsch	Français	Français du Canada	Italiano	Magyar	Nederlands	Norsk	Polski	Português	Română	Suomi	Svenska	Türkçe	Čeština	日本語	한국어	Русский	ไทย	简体中文	繁體中文	العربية	UK English	
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<p>Set Trace Flags</p>																											

Accounts Payable

- Matching Process
- Submitting invoices
 - ap@slco.org
- Vendor/Supplier Mailbox
 - suppliers@slco.org
 - Supplier name on the subject line
- Excel Upload files
 - Multiple invoices/accounting lines
 - Similar payments to multiple suppliers
 - <http://www.slco.org/mayor/finance>



Assets Management

Look Up Profile ID

Help

Asset Profile ID: begins with

[Basic Lookup](#)

Search Results

View 100

First 1-102 of 102 Last

AM Business Unit	Asset Profile ID	Description	Capitalized Asset
SLC01	ART	Art- Non-depreciable	Y
SLC01	ART01	Art 12 months	Y
SLC01	ART15	Art 180 months	Y
SLC01	BLDG/IMP01	Building/Bldg Imp- 12 months	Y
SLC01	BLDG/IMP15	Building/Bldg Imp- 180 months	Y
SLC01	BLDG/IMP20	Building/Bldg Imp- 240 months	Y
SLC01	BLDG/IMP25	Building/Bldg Imp- 300 months	Y
SLC01	BLDG/IMP30	Building/Bldg Imp- 360 months	Y
SLC01	BLDG/IMP35	Building/Bldg Imp- 420 months	Y
SLC01	BLDG/IMP40	Building/Bldg Imp- 480 months	Y
SLC01	BLDG/IMP50	Building/Bldg Imp- 600 months	Y
SLC01	BLDG/IMPND	Building/Bldg Imp- Non Deprec	Y
SLC01	BRIDGE 30	Bridge or Viaducts- 360 months	Y
SLC01	BRIDGE 45	Bridge or Viaducts- 540 months	Y
SLC01	BRIDGE ND	Bridge or Viaducts Non-Deprec	Y
SLC01	CDIPS	Dev in Prog.-Softwr&Intangible	Y
SLC01	CIP	Construction In Progress	Y
SLC01	FF&E 20	Furn/Equip/SW=>5000-240 months	Y
SLC01	FF&E ND	Furn/Equip/SW Non-Deprec	Y
SLC01	FF&E01	Furn/Equip/SW=>5000 12 Months	Y
SLC01	FF&E02	Furn/Equip/SW=>5000- 24 months	Y
SLC01	FF&E03	Furn/Equip/SW=>5000- 36 months	Y
SLC01	FF&E04	Furn/Equip/SW=>5000- 48 months	Y
SLC01	FF&E05	Furn/Equip/SW=>5000- 60 months	Y
SLC01	FF&E06	Furn/Equip/SW=>5000-72months	Y
SLC01	FF&E07	Furn/Equip/SW=>5000- 84 months	Y
SLC01	FF&E08	Furn/Equip/SW=>5000 -96 months	Y
SLC01	FF&E10	Furn/Equip/SW=>5000-120 months	Y



Questions & Comments



Next Steps.....

- Make time at your desk and go through the UPKs
- Proficiency takes time and practice...
- Practice... Don't be afraid to make a mistake
- Call mentors and us for help

