

# Course Outline

## 80308 - Procurement in Microsoft Dynamics AX 2012

### General Description

This two-day instructor-led course, Procurement and Sourcing in Microsoft Dynamics AX 2012, provides students with the necessary tools and resources to perform basic tasks in the procurement flow in Microsoft Dynamics AX 2012.

### Outcomes

At the end of the course, students will be able to:

- Review the main concepts of Procurement and sourcing in Microsoft Dynamics AX 2012.
- Create and manage products.
- Describe the setup that is required and optional before creating vendors.
- Create a new vendor.
- Review various types of catalogs, including their usages.
- Set up category hierarchies and work with procurement categories.
- Work with procurement, vendor, and external catalogs.
- Manage the request for quotation process.
- Create, complete, and follow-up on purchase requisitions.
- Set up purchasing parameters.
- Create and process purchase orders.
- Describe the change management process, and set up the system for change management.
- Create and process vendor returns. Create and process purchase agreements.
- Use the features of the Vendor Self-service Portal.
- Manage transactions on the Procurement Order site.
- Order products using the Employee Services site.
- Define purchasing policy parameters.
- Create and configure purchasing policies.
- Describe the workflows available for procurement and sourcing.

### Course Details

Course code: 80308  
Duration: 2 days  
Starting time: 9am  
Finishing time: 4.30pm

### Booking guidelines

Contact our learning consultants on 1300 86 87246 and we will assist you with your booking.



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## ➤ **Module 1: Procurement Overview**

This chapter provides a general overview of Procurement and sourcing in Microsoft Dynamics AX 2012.

### **Lessons**

- About Procurement and Sourcing
- Enterprise Portal Features
- Integration
- End-To-End Scenario

After completing this chapter, students will be able to:

- Describe the main concepts of Procurement and sourcing in Microsoft Dynamics AX 2012.
- List the features available in the Enterprise Portal for Procurement and sourcing.
- List the integration points to other Microsoft Dynamics AX modules and the Procurement and sourcing module.
- Describe the procurement process.

## ➤ **Module 2: Product Information Management**

This chapter concentrates on how to create and set up a new product. Creating new products is completed through the Product information management module.

### **Lessons**

- Introduction
- Defining Products
- Modeling Configurable Products
- Inventory Dimension Groups
- Authorizing Product Setup in a Legal Entity
- Finalizing Product Setup in a Legal Entity

### **Lab: 2.1: Create and Release Product Masters**

- Create and release a new product master, with several product variants.

### **Lab: 2.2: Create and Apply a Product Template to Multiple Products**

- Create a Product template and apply the template to products

After completing this chapter, students will be able to:

- Describe the concept of products.

- Describe the concept of product masters and their variants.
- Describe the variant configuration technology types.
- Discuss inventory dimension groups.
- Create and release products to an enterprise.
- Discuss how to finalize a released product.

## ➤ **Module 3: Vendors**

This chapter concentrates on creating vendors and managing vendor information.

### **Lessons**

- Introduction
- Set Up for Vendors
- Create Vendors
- Vendor Tasks
- Vendor Reports and Inquiries

### **Lab: 3.1: Create a Vendor Group**

- Set up a vendor group.

### **Lab: 3.2: Create a Vendor**

- Create a vendor

After completing this chapter, students will be able to:

- Describe the setup that is required and optional before creating vendors.
- Create a new vendor.
- Change a vendor's name.
- Place a vendor on hold.
- Add vendors to another legal entity.
- View vendor transactions.
- View vendor information.

## ➤ **Module 4: Catalogs**

This chapter reviews the process for creating catalogs and category hierarchies. Three types of catalogs are reviewed—procurement, vendor, and external catalogs.

### **Lessons**

- About Catalogs
- Category Hierarchies
- Category Attributes
- Commodity Codes
- Procurement Category Management
- Procurement Catalogs
- Vendor Catalogs
- External Catalogs

- Catalog Comments
- Category Reports

### **Lab: 4.1: Create New Categories**

- Create categories and subcategories in an existing category hierarchy.

### **Lab: 4.2: Create Category Attributes**

- Create attribute types and attributes, and then link the new attributes to a category in the category hierarchy.

After completing this chapter, students will be able to:

- Review various types of catalogs, including their usages.
- Create new category hierarchies and categories.
- Create attributes and assign them to categories.
- Create commodity codes and assign them to a category.
- Set up procurement categories.
- Create and publish a procurement catalog.
- Review the process to configure and import a vendor catalog.
- Review the process to configure and validate an external catalog.
- Activate catalog comments and approve or reject submitted comments.
- Review the reports available in Procurement and sourcing for categories and catalog management.

## ➤ **Module 5: Request for Quotation**

This chapter explains the request for quotation process. Steps for creating, following-up, and processing a request for quotation reply are reviewed. Additionally, reports and inquiries for request for quotations are reviewed.

### **Lessons**

- Introduction
- Set Up Request for Quotations
- Issue a Request for Quotation
- Follow-up on Request for Quotations
- Request for Quotation Replies

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- Transfer Accepted Request for Quotation Replies
- Request for Quotation Reports and Inquiries

## Lab: 5.1: Create a Request for Quotation

- Create a request for quotation, add vendors to the case, add items to the case, and send the request for quotation to the vendor.

After completing this chapter, students will be able to:

- Set up system parameters prior to using a request for quotation.
- Create a request for quotation.
- Follow-up on a request for quotation.
- Register a request for quotation reply.
- Compare request for quotation replies.
- Accept a request for quotation reply.
- Reject a request for quotation reply.
- Return a request for quotation reply.
- Review the request for quotation reports and inquiries.

## ➤ Module 6: Purchase Requisitions

This chapter focuses on how to create and complete purchase requisitions. The chapter also discusses how to convert purchase requisitions to purchase orders. Additionally, demand consolidations are discussed.

### Lessons

- Introduction
- About Purchase Requisitions
- Create Purchase Requisitions
- Complete a Purchase Requisition
- Follow-up on Purchase Requisitions
- Convert Purchase Requisitions to Purchase Orders
- Demand Consolidations
- Other Purchase Requisition Tasks
- Purchase Requisition Workflow

## Lab: 6.1: Create a Purchase Requisition

- Create and submit a purchase requisition.

After completing this chapter, students will be able to:

- Describe the purchase requisition process and the associated list pages used to manage purchase requisitions.
- Create purchase requisitions.
- Complete purchase requisitions.
- Follow-up on purchase requisitions.
- Convert purchase requisitions to purchase orders.
- Describe and use demand consolidations.
- Describe other purchase requisition tasks.
- Explain the purchase requisition workflow.

## ➤ Module 7: Purchase Orders

This chapter reviews the process of creating and processing a purchase order. Additionally, the change management process is reviewed.

### Lessons

- Introduction
- Working with Purchase Orders
- Set Up Accounts Payable Parameters
- Create a Purchase Order
- Process a Purchase Order
- Change Management
- Purchase Order Tasks
- Purchase Order Inquiries and List Pages

## Lab: 7.1: Create Purchase Orders

- Create a purchase order with a multiple delivery addresses

## Lab: 7.2: Change Management

- Enable change management and create a purchase order to be submitted through workflow

After completing this chapter, students will be able to:

- Describe the various forms and list pages for working with purchase orders.
- Set up purchasing parameters.
- Create a purchase order and add lines to it.
- Process a purchase order.

- Explain the change management process, and set up the system for change management.
- Describe additional tasks that can be completed for a purchase order.
- Describe the reports and inquiries available for purchase orders.

## ➤ Module 8: Vendor Returns

This chapter discusses how to return a product to a vendor. You will also be shown how to handle the returns with and without serial and batch numbers attached.

### Lessons

- Introduction
- Create Vendor Returns
- Create Vendor Returns for Serialized Items

## Lab: 8.1: Working with Vendor Returns

- Create a vendor return by copying an original purchase order

## Lab: 8.2: Complete a Vendor Return Using the Returned Order Type

- Create a vendor return with batch numbers by using the Returned order type.

After completing this chapter, students will be able to:

- Create a vendor or customer return by using a Negative quantity, the Create credit note feature, and the purchase order type Returned order.
- Return an item with multiple serial and batch numbers to a vendor.
- Return a Not-Stocked item to a vendor.

## ➤ Module 9: Purchase Agreements

In this chapter, concepts of purchase agreements are discussed. You will be shown how to create purchase agreements and how to use purchase agreements when you create purchase orders.

### Lessons

- Purchase Agreements

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## Lab: 9.1: Setting Up and Following Up on a Purchase Agreement

- Create a purchase agreement, and then create a release order from the purchase agreement. Finally, you will print the purchase agreement fulfillment report.

After completing this chapter, students will be able to:

- Describe how purchase agreements work.
- Discuss how to create purchase agreements.
- Review how to define purchase agreements.
- Discuss how to use agreements when you create orders.
- Explain how to follow up on agreements.

## ➤ Module 10: Vendor Self-Service Portal

This chapter reviews scenarios where your vendors connect to the Vendor Self-service Portal to view transactional information and respond to request for quotations.

### Lessons

- Introduction
- Vendor Role Center
- Vendor Profiles
- Notifications
- Questionnaires
- Transactions
- Vendor Self-Service Portal Security

### Lab: 10.1: Add a Contact

- Add a new vendor contact on the Vendor Portal.

### Lab: 10.2: Create and Send Vendor Notifications

- Create and send a vendor notification.

After completing this chapter, students will be able to:

- Describe the features of the vendor role center.
- Update vendor profile information, add contacts, create user requests, and category requests.

- Create, send, and view notifications on the Vendor Self-service Portal.
- View and complete questionnaires on the Vendor Portal.
- Describe the transactions that can be viewed or modified in the Vendor Portal.
- Respond to requests for quotations.
- Create and maintain vendor invoices.
- Describe the roles available for the Vendor Portal.

## ➤ Module 11: Procurement Order Site

In this chapter you will create purchase requisitions and view purchase order information using the Procurement Order site. In addition, you will be shown how to use the Employee Services site to search for products and purchase products.

### Lessons

- Introduction
- Purchase Requisitions
- Managing Purchase Information
- Product Receipt Confirmations
- Order Products on the Employee Services Site

### Lab: 11.1: Purchase Requisitions

- Create a purchase requisition on the Procurement Order site.

### Lab: 11.2: Order Products and Check Out

- Search for products and add products to your cart and check out using the checkout wizard on the Employee Services website.

After completing this chapter, students will be able to:

- View and create purchase requisitions on the Procurement Order site.
- View purchase orders, purchase order confirmations, product receipts, and vendor invoices.
- View and create product receipt confirmations.
- Order products using the Employee Services site.

## ➤ Module 12: Purchasing Policies and Signing Limits

This chapter reviews the policy framework in Microsoft Dynamics AX 2012. You will be shown how to create purchasing policies and signing limits. In addition, steps for configuring each type of policy rule are reviewed.

### Lessons

- Introduction
- About Policies
- Purchasing Policy Set Up
- Create Purchasing Policies
- Configure Catalog Policy Rules
- Configure Category Access Policy Rules
- Configure Category Policy Rules
- Configure Purchase Requisition RFQ Rules
- Configure Purchase Requisition Control Rules
- Configure Purchase Order Creation and Demand Consolidation Rules
- Expenditure Reviewers
- Limits

### Lab: 12.1: Create and Configure a Purchase Requisition RFQ Rule

- Create a new purchasing policy and configure a purchase requisition RFQ.

### Lab: 12.2: Configure a Default Signing Limit Policy Rule

- Create a new signing limit policy and configure a default signing limit.

After completing this chapter, students will be able to:

- Describe policy organizations and policy rules.
- Define purchasing policy parameters.
- Create and manage a purchasing policy.
- Configure a catalog policy rule.
- Configure a category access policy rule.
- Configure category access policy rules.
- Configure a purchase requisition request for quotation (RFQ) rule.
- Configure a purchase requisition control rule.

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- Configure purchase order creation and demand consolidation rules.
- Configure expenditure reviewers for purchase orders and purchase requisitions.
- Configure signing limit policy rules.

## ➤ **Module 13: Workflow**

This chapter reviews the workflows that are available for procurement and sourcing. You will be shown a demonstration on how to set up a purchase requisition workflow.

### **Lessons**

- Introduction
- About Workflow
- Procurement Catalog Workflows
- Purchasing Workflows
- Vendor Workflows
- Demonstration: Configure a Purchase Requisition Workflow

After completing this chapter, students will be able to:

- Describe the basic features and steps to create and configure a workflow.
- Describe the workflows available for procurement catalogs.
- Describe the purchasing workflow types.
- Describe the vendor related workflows available in Procurement and sourcing.
- Demonstrate the steps to set up a purchase requisition workflow.