



E-Procurement Systems: Procure-to-Pay, E-Sourcing, E-Auctions and E-Invoicing



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Introduction:

E-procurement programmes often stall after go-live: requesters bypass catalogues, approvals route to the wrong people, online tenders are run like paper ones, reverse auctions start without clear rules and invoices still fail to match orders. The result is spend leakage, weak audit trails and negotiated savings that never reach the invoice. This Core Concept course equips procurement, finance and systems teams to design and govern e-procurement systems end to end, from procure-to-pay workflows and e-sourcing to e-auctions, e-invoicing controls and roll-out. Participants produce an E-Procurement Roadmap with a P2P process design and e-auction plan for a case organisation.

Course Objectives:

- Assess digital procurement maturity and define the target e-procurement operating model and system scope
- Design procure-to-pay workflows, requisition forms, approval routing and buying channels, including catalogues, punch-out and guided buying
- Configure online RFI, RFQ and RFP events and electronic tenders with sealed bids, scoring envelopes and a complete event log
- Set reverse e-auction formats and rules and govern electronic contracts in a searchable repository
- Control e-invoicing, three-way match, purchasing cards, segregation of duties and fraud risk inside the e-procurement system
- Build an e-procurement business case, adoption plan and KPI scorecard and combine them into an E-Procurement Roadmap for a case organisation

Target Audience:

- Procurement managers accountable for purchasing channels, sourcing events and policy compliance
 - Senior buyers and category leads who run online sourcing events, tenders and supplier auctions
 - Finance and accounts payable managers responsible for invoice matching, payment controls and purchasing card programmes
 - ERP and procurement systems managers who configure workflows, catalogues and supplier portals
 - Internal control and procurement governance managers who review segregation of duties and system audit trails
 - Transformation and project managers leading e-procurement selection and roll-out
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Course Outline:

Day 1: Digital Procurement Strategy, Maturity and Operating Model

- E-Procurement Scope Map: E-Sourcing, E-Tendering, E-Auction, E-Purchasing and E-Invoicing
- Source-to-Pay Versus Procure-to-Pay System Boundaries
- Digital Procurement Maturity Assessment Grid
- Purchasing Channel Inventory and Paper Process Baseline
- E-Procurement Target Operating Model Canvas

Day 2: Procure-to-Pay Process Architecture and Requisition Workflows

- Procure-to-Pay Stage Model: Requisition, Purchase Order, Receipt, Invoice Reconciliation and Payment
- Buying Channel Decision Matrix: Catalogue, Free-Text, Contract Call-Off and Sourcing Event
- Requisition Form Design with Mandatory Fields and Commodity Codes
- Approval Workflow Rules: Value, Cost Centre and Category Routing
- Swimlane Model of the Future-State P2P Flow

Day 3: E-Catalogues, Punch-Out and Guided Buying

- Hosted E-Catalogue Content Loading and Price Validation
- Punch-Out Catalogue Session Flow and Cart Return Mechanics
- Guided Buying Pages, Buying Policies and Preferred Supplier Flags
- Catalogue Coverage Analysis and Maverick Spend Leakage Map
- Tail-Spend Channels for Low-Value High-Volume Purchases

Day 4: E-Sourcing and Online RFx Events

- Online RFI Market Sounding Questionnaire
- Electronic RFQ and RFP Event Configuration: Lots, Line Items and Attachments
- Weighted Evaluation Envelopes and Online Scoring Sheets
- Clarification Messaging, Addenda Publication and Event Log
- Supplier Response Comparison Grid and Award Recommendation Export

Day 5: E-Tendering, Electronic Bid Opening and Week-One Case

- Two-Envelope Electronic Tender Set-Up: Technical and Commercial Sealing
 - Time-Locked Bid Vault and Electronic Bid Opening Record
 - Late Submission, Bid Withdrawal and System Outage Contingency Rules
 - Guided Case: Converting a Paper Tender for a Facilities Services Contract
 - Week-One Integration Review of Channel, Sourcing and Tendering Design Choices
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Day 6: Reverse E-Auction Design and Electronic Contracting

- Reverse Auction Formats: English, Dutch, Japanese and Sealed-Bid
- Auction Rules Sheet: Start Price, Decrement, Soft-Close Extension and Rank Visibility
- Multi-Attribute Scoring Auctions and Transformation Bidding Formulas
- Supplier Auction Rehearsal and Bidder Briefing Plan
- Electronic Contract Authoring, Clause Library and Contract Repository Metadata

Day 7: E-Invoicing, Payment Controls and E-Procurement Fraud Risk

- Electronic Invoice Formats and Invoice Data Validation Rules
- Three-Way Match Tolerances: Purchase Order, Goods Receipt and Invoice
- Purchasing Card Programme Rules, Merchant Category Blocks and Statement Reconciliation
- Segregation of Duties Conflict Matrix and System Audit Trail Review
- E-Procurement Fraud Scenarios: Fictitious Suppliers, Bid Manipulation and Split Requisitions

Day 8: Supplier Portals, Change Management and User Adoption

- Supplier Portal Self-Registration and Onboarding Workflow
- Vendor Master Data Governance and Bank Detail Change Verification
- Stakeholder Impact Map for Requesters, Approvers, Finance and Suppliers
- User Adoption Plan: Role-Based Training, Help Desk and Super-User Network
- Phased Roll-Out Plan: Pilot Site, Deployment Waves and Legacy Switch-Off

Day 9: Spend Analytics, System Selection and E-Procurement KPIs

- Spend Data Cleansing and Classification Taxonomy Mapping
- E-Procurement KPI Scorecard: Requisition-to-Order Cycle Time, Catalogue Compliance and Touchless Invoice Rate
- Savings Capture Tracking from Sourcing Award to Invoice Price
- System Selection Scorecard, Demonstration Scripts and Reference Checks
- E-Procurement Business Case: Cost Model, Benefit Profile and Payback

Day 10: Capstone: E-Procurement Roadmap for a Case Organisation

- Case Organisation Briefing: Multi-Site Manufacturer with Fragmented Purchasing
 - E-Procurement Roadmap Build: Maturity Target, Phases and Owners
 - Future-State P2P Process Design and Approval Matrix for the Case
 - Reverse E-Auction Plan for a Selected Category
 - Capstone Presentation to a Steering Committee Challenge Panel
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Skills You Will Gain:

- Digital Procurement Maturity Assessment
- P2P Process Architecture
- Catalogue and Punch-Out Management
- E-Sourcing Event Design
- Reverse Auction Rule Setting
- Invoice Matching Control
- Segregation of Duties Analysis
- E-Procurement Business Case Development

Why Attend This Course:

- Leave with an E-Procurement Roadmap, P2P process design and e-auction plan tested on a case organisation
- Know which purchases belong in catalogues, which in sourcing events and which in auctions, and how the system should route each one
- Close the gaps that let split requisitions, fictitious suppliers and unmatched invoices pass through the system
- Compare roll-out experience with procurement, finance and systems peers from manufacturing, services, healthcare and public organisations

Conclusion:

E-procurement delivers value when every purchase follows a designed channel, every sourcing event leaves an audit trail and every invoice matches what was ordered and received. Week one moves from maturity and procure-to-pay architecture through catalogues, punch-out, online RFX and electronic tendering. Week two adds what a shorter course leaves out: reverse auction design, electronic contracting, e-invoicing and payment controls, fraud risk, supplier portals, adoption, analytics, system selection and KPIs. The final day turns this into an E-Procurement Roadmap with a P2P process design and e-auction plan for a case organisation.
