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PeopleSoft Enterprise eProcurement 9.1 PeopleBook

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PeopleSoft Enterprise eProcurement 9.1 PeopleBook
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Oracle's PeopleSoft Enterprise eProcurement Preface

This preface discusses:

- Oracle's PeopleSoft products

- PeopleSoft application fundamentals.

- Pages with deferred processing.

- Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

Oracle's PeopleSoft Products

This PeopleBook refers to these products:

- PeopleSoft eProcurement.

- PeopleSoft Purchasing.

- PeopleSoft Services Procurement.

- PeopleSoft Strategic Sourcing.

PeopleSoft Application Fundamentals

This section discusses:

- Where to find additional information for PeopleSoft eProcurement.

- Delivered ChartFields.

Where to Find Additional Information for PeopleSoft eProcurement

The *PeopleSoft eProcurement PeopleBook* provides implementation and processing information for the PeopleSoft eProcurement system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

These companion PeopleBooks contain information that applies specifically to PeopleSoft eProcurement:

- *PeopleSoft Application Fundamentals for FIN, ESA, and SCM PeopleBook.*

- *PeopleSoft Setting Up Global Options and Reports.*

- *PeopleSoft Setting Up and Using Commitment Control.*

- *PeopleSoft Purchasing.*

- *PeopleSoft Managing Procurement.*

- *PeopleSoft Managing Items.*

- *PeopleSoft Working with Third-Party Applications.*

Delivered ChartFields

This table describes the ChartFields delivered for this PeopleSoft application:

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
1	Account	Account	ACCOUNT	10	Active	Classifies the nature of a transaction. This field is required. Use it for corporate accounts.
2	Alternate Account	Alt Acct	ALTACCT	10	Active	Classifies the nature of a transaction for regulatory authorities. Use it for statutory accounting.
3	Operating Unit	Oper Unit	OPERATING_UNIT	8	Active	Can be used to indicate a location, such as a distribution warehouse or a sales center.
4	Fund Code	Fund	FUND_CODE	5	Active	The primary structural units of Education and Government accounting.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
5	Department	Dept	DEPTID	10	Active	Tracks information according to a divisional breakdown of the organization. This value can be used to indicate who is responsible for or affected by a transaction.
6	Program Code	Program	PROGRAM_CODE	5	Active	Tracks revenue and expenditures for programs within or across the organizations. This value can be used to identify groups of related activities, cost centers, revenue centers, responsibility centers, and academic programs.
7	Class Field	Class	CLASS_FLD	5	Active	When combined with a Fund, Organization, Program Code, and Budget Reference, identifies the activity for an appropriation.
8	Budget Reference	Bud Ref	BUDGET_REF	8	Active	Use to identify unique budgets when individual budgets share budget keys and overlapping budget periods.
9	Product	Product	PRODUCT	6	Active	Captures additional information useful for profitability and cash flow analysis by product sold or manufactured.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
10	Project ID/Grant	Project	PROJECT_ID	15	Active	• Captures additional information useful for grant and project accounting. • The Project ChartField does not have effective dating.
99	ChartField 3	*Variable*	CHARTFIELD3	10	Inactive	Generic expansion ChartField is delivered Inactive. It can be configured for use, hidden, or deleted.
99	ChartField 2	*Variable*	CHARTFIELD2	10	Inactive	Generic expansion ChartField is delivered Inactive. It can be configured for use, hidden, or deleted.
99	ChartField 1	*Variable*	CHARTFIELD1	10	Inactive	Generic expansion ChartField is delivered Inactive. It can be configured for use, hidden, or deleted.
11	Affiliate	Affiliate	AFFILIATE	5	Active	Used to map transactions between business units when using a single interunit account.
12	Fund Affiliate	Fund Affil	AFFILIATE_INTRA1	10	Active	Use to correlate transactions between funds when using a single intraunit account.

Grid Order	Label Long Name	Label Short Name	ChartField Name	Field Length	Active or Inactive	Definition
13	Operating Unit Affiliate	Oper Unit Affil	AFFILIATE_INTRA2	10	Inactive	Use to correlate transactions between operating units when using a single intraunit account.
14	Statistics Code	Statistics Code	STATISTICS_CODE	3	Active	Identifies non-monetary statistical amounts. Statistic codes are associated with a specific unit of measure.
15	Scenario	Scenario	BD_SCENARIO	10	Active	Identifies different budget iterations that use different assumptions.
16	Currency Code	Currency Code	CURRENCY_CD	3	Active	Identifies currencies; for example, FRF for French francs.
17	Book Code	Book Code	BOOK_CODE	4	Active	Identifies subsets of ledger rows to segregate and maintain in the same ledger various accounting, recording and reporting requirements for transactions in different accounting environments.
18	Adjustment Type	Adjustment	GL_ADJUST_TYPE	4	Active	Use to define adjustment types associated with varying accounting treatments of prior period adjustments.

Pages with Deferred Processing

Several pages in PeopleSoft eProcurement operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page—for example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer, "Designing Pages for Optimal Performance and Accessibility"

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

• Understanding the PeopleSoft online library and related documentation.

• How to send PeopleSoft documentation comments and suggestions to Oracle.

• How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

• Understanding PeopleBook structure.

• Typographical conventions and visual cues used in PeopleBooks.

• ISO country codes and currency codes.

• PeopleBooks that are common across multiple applications.

• Common elements used in PeopleBooks.

• Navigating the PeopleBooks interface and searching the PeopleSoft online library.

• Displaying and printing screen shots and graphics in PeopleBooks.

• How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.

• Understanding documentation integration and how to integrate customized documentation into the library.

• Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Common Elements Used in This PeopleBook

Amount	Displays the total item price and the transaction currency from the requisition.
Account	Change this value only to change the standard accounting structure.
Business Unit	An identification code that represents a high-level organization of business information You can use a business unit to define regional or departmental units within a larger organization.
Description	Free-flow text up to 30 characters.
Due Date	The date the items are scheduled to arrive at the Ship To location.
Effective Date	Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row
GL Unit (general ledger unit)	Displays the PeopleSoft General Ledger business unit that is defined on the Purchasing Definition - Business Unit Definition page
Item Description	The item description as defined on the Purchasing Attributes page.
Language or Language Code	The language in which you want the field labels and report headings of reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Percent	Enter a percentage of the quantity or the amount to distribute. The system updates either the Amount or Quantity field value, depending on the selection in the Distribute by field.
Price	Displays the vendor's unit price and currency for the item, which are assigned on the Vendor's UOM & Pricing Info (vendor's unit of measure and pricing information) page.
Product	Identifies a product. If you use PeopleSoft Project Costing, a Project ID link replaces this field.
Project ID	Click to access the Projects Information page, where you can enter any information that is relevant to the project. This field appears only if you are using PeopleSoft Project Costing.

Process Frequency (group box)	Designates the appropriate frequency in the Process Frequency group box:
	Once executes the request—one time only—the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.
	Always executes the request every time the batch process runs.
	Don't Run ignores the request when the batch process runs.
Process Monitor	This link takes you to the Process List page, where you can view the status of submitted process requests.
Report ID	The report identifier.
Report Manager	This link takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Request ID	A request identification that represents a set of selection criteria for a report or process.
Requisition	The means for ordering goods and services.
Run	Click this button to take you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
SetID	An identification code that represents a set of control table information or TableSet. A TableSet is a group of tables (records) necessary to define the organizational structure and processing options.
Ship To	The location code that indicates the location where the vendor should deliver the items.
Shopping Cart	A tool used to create requisitions. The cart displays requisition line items, their quantities, and cost.
Short Description	Free-flow text up to 15 characters.
Status	The options in this field are *Active* or *Inactive.* By linking status and effective date, you can retain historical information and plan future implementation. For auditing purposes, Oracle encourages inactivating data that is no longer in use instead of deleting it.
User ID	The system identifier for the individual who generates a transaction.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

Chapter 1

Getting Started with PeopleSoft eProcurement

This chapter provides an overview of Oracle's PeopleSoft Enterprise eProcurement business processes and discusses:

• eProcurement integrations.

• eProcurement implementation.

Oracle's PeopleSoft Enterprise eProcurement Business Processes

PeopleSoft eProcurement is designed to help you requisition items. This method helps reduce out-of-system purchasing, also known as maverick purchasing. PeopleSoft eProcurement helps enforce contract purchasing as well as capture spending information for future analysis. By improving requisition creation and usage, employee training is simplified, which reduces the total cost of ownership.

The diagram shows the PeopleSoft eProcurement business processes including the actions involving requisitions, change requests, approvals, purchase orders, catalogs, and receipts:
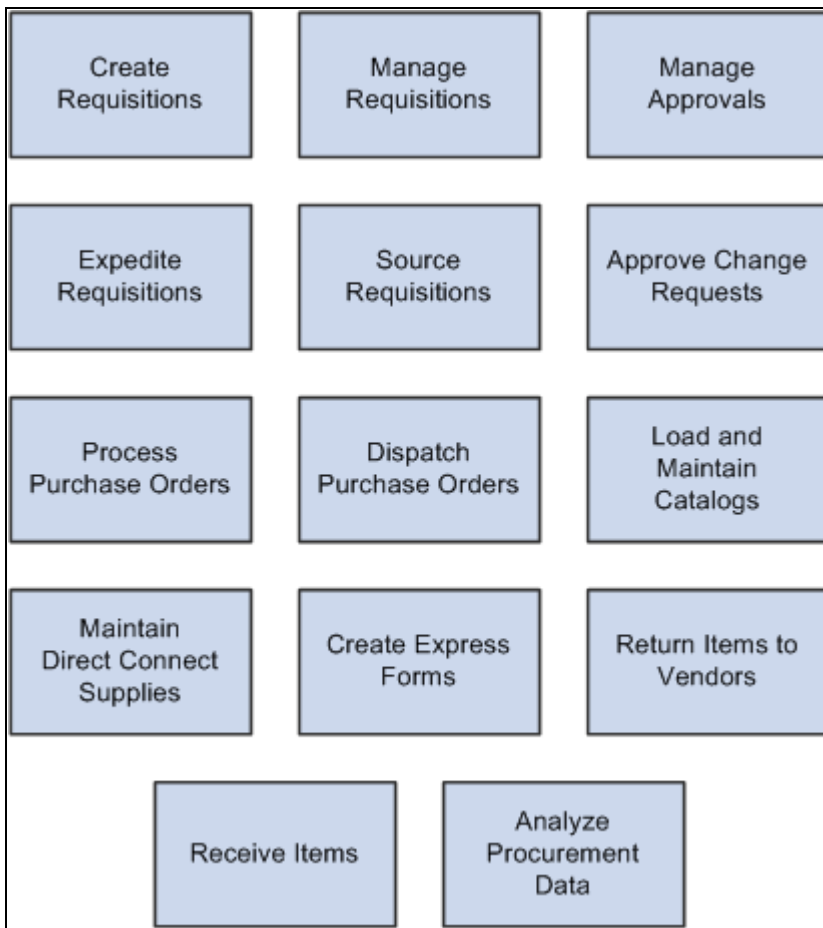
PeopleSoft eProcurement business processes.

We discuss these business processes in the business process chapters in this PeopleBook.

eProcurement Integrations

This diagram shows how PeopleSoft eProcurement integrates with other PeopleSoft applications within PeopleSoft Financials and Supply Chain Management and PeopleSoft HRMS:
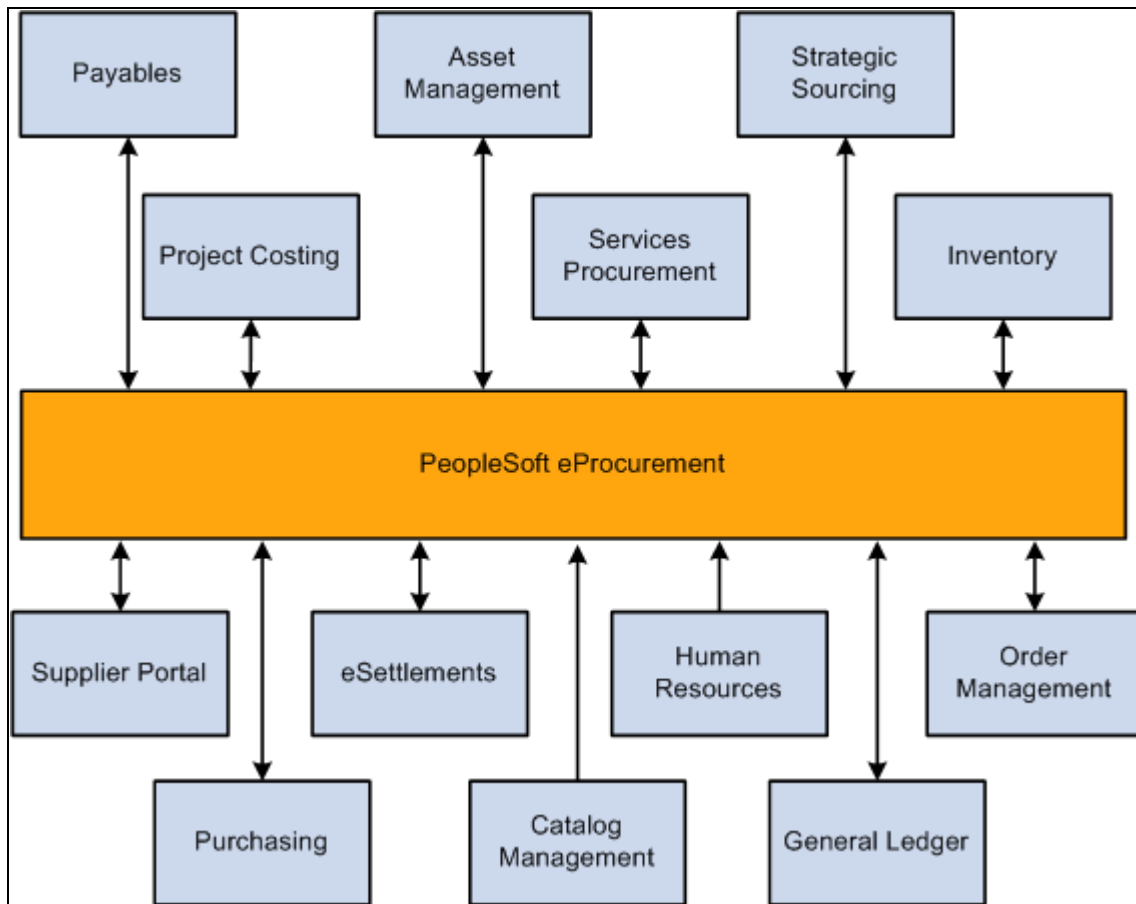
PeopleSoft eProcurement integration with other PeopleSoft applications.

As a standalone product, PeopleSoft eProcurement facilitates the process of procuring and managing resources. As an integrated solution, it enhances the existing PeopleSoft Services Procurement, Catalog System, and PeopleSoft HRMS functionality.

PeopleSoft applications interact with one another, sharing the same relational data structures and many of the same core tables. If you're not ready to implement other PeopleSoft applications, you can use PeopleSoft eProcurement as a standalone product, interfacing it with your existing accounting and distribution applications. Because PeopleSoft eProcurement is part of an enterprise solution, it is designed for transparent integration with PeopleSoft Supply Chain Management, PeopleSoft Financials, and PeopleSoft Human Capital Management.

PeopleSoft Payables

The interaction of PeopleSoft eProcurement and PeopleSoft Payables data and processing enables you to match vouchers with all purchase order and receiver details. You can automatically generate debit memos for goods that are returned to a supplier.

PeopleSoft Asset Management

A direct link with PeopleSoft Asset Management streamlines the entry of asset information. Seamless interaction between PeopleSoft eProcurement, PeopleSoft Asset Management, and PeopleSoft Payables enables you to pass asset information, capitalize assets at point of receipt, process modifications to existing assets, and create work orders for maintenance of the asset. Requisitions and purchase orders can be created to acquire parts and services for specific work orders that are associated with the asset.

PeopleSoft Strategic Sourcing

PeopleSoft eProcurement integrates with PeopleSoft Strategic Sourcing to generate contracts and purchase orders. You create requisitions using PeopleSoft eProcurement to send out for bids. This facilitates the collaboration between buyers and suppliers of goods and services, and reduces costs by accepting competitive bidding for goods and services.

PeopleSoft Project Costing

PeopleSoft eProcurement creates requisitions based on project activity requests in PeopleSoft Project Costing and returns ordered material transactions to PeopleSoft Project Costing as committed costs.

PeopleSoft Services Procurement

Integration between PeopleSoft eProcurement and PeopleSoft Services Procurement enables users to have a single common interface to requisition both goods and services. A hiring manager can order a configured workstation and standard office supplies, along with the skills-based request, all from the same requisition.

PeopleSoft Inventory

Close integration between PeopleSoft eProcurement and PeopleSoft Inventory enables you to share common item definitions and set up items from one menu for both PeopleSoft eProcurement and PeopleSoft Inventory. Using the Quick Sourcer feature, you can create material stock requests to fill requisitions from inventory stock.

PeopleSoft Supplier Portal

PeopleSoft eProcurement integrates with the Supplier Portal through the dispatch process. Using the Supplier Portal, buyers can collaborate more efficiently with their suppliers.

PeopleSoft eSettlements

PeopleSoft eProcurement integrates with PeopleSoft eSettlements to enable vendors to enter invoices against POs that have been generated from PeopleSoft eProcurement.

PeopleSoft Human Resources

PeopleSoft eProcurement incorporates an application message that enables automatic updates to the system from a PeopleSoft HRMS database. Relevant changes to employee data in the JOB record can result in the creation of new requesters in eProcurement. Changes to roles, departments, business units, and database access can also be updated.

PeopleSoft Order Management

When PeopleSoft Order Management requires that incoming or purchased items be reserved for a specific customer sales order, PeopleSoft eProcurement uses pegging functionality to directly ship the items to the customer, or to ship to an inventory location as reserved for the customer order.

PeopleSoft Purchasing

Close integration between PeopleSoft eProcurement and PeopleSoft Purchasing enables you to share common control data, such as item definitions for both PeopleSoft eProcurement and PeopleSoft Purchasing. It enables you to create requisitions, purchase orders, receipts, and other transactions that will be stored in shared tables. The combination offers a complete solution for direct, indirect, service, and project purchases in an integrated environment.

PeopleSoft Catalog Management

PeopleSoft eProcurement delivers a comprehensive integration to PeopleSoft Catalog Management. Catalog content may be aggregated from multiple suppliers and then loaded into the PeopleSoft Item Master table. This provides a uniform mechanism for ordering goods from multiple suppliers that would otherwise be represented in disparate formats.

PeopleSoft General Ledger

PeopleSoft eProcurement interacts with PeopleSoft General Ledger for budget checking and commitment control. With this integration, you can ensure that funds are available for requisitions before they are submitted.

Other Sources of Integration Information

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on Oracle's PeopleSoft Customer Connection website.

eProcurement Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for the organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of the implementation, take advantage of all Oracle sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appear in the preface in the *PeopleSoft Application Fundamentals 9.1 PeopleBook* with information about where to find the most current version of each.

Chapter 2

Navigating in PeopleSoft eProcurement

This chapter discusses how to:

*   Navigate in PeopleSoft eProcurement.

*   Navigate in PeopleSoft eProcurement Implementation.

Navigating in PeopleSoft eProcurement

PeopleSoft eProcurement provides a custom navigation center page that contains a grouping of folders that support the activities of an organizational buyer, specific to business processes and tasks.

Note. In addition to the custom navigation center page, PeopleSoft eProcurement provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in PeopleSoft eProcurement

This table lists the custom navigation pages that you use to navigate in the PeopleSoft eProcurement Procurement Card Center.

The Procurement Card Center custom navigation pages are intended for the person in the organization who is responsible for all aspects of the Procurement Card, including setup and maintenance.

Page Name	Navigation	Usage
Procurement Card Center	eProcurement, Procurement Card Center	Access the primary Procurement Card Center menu and activities.
Inquire Procurement Card Request	Click the Request Procurement Card link on the Procurement Card Center page.	Add new or inquire existing procurement card requests.
Statement Summary	Click the Review Bank Statement link on the Procurement Card Center page.	View statement summaries by credit card vendor, billing date, or status.

Page Name	Navigation	Usage
Reconcile	Click the Reconcile link on the Procurement Card Center page.	Access the Reconcile Statement and Review Disputes menu options on the Reconcile page.
Process Statements	Click the Process Statements on the Procurement Card Center page.	Access the Load ProCard Stage, Load Statement, Correct Errors, Load Voucher Stage, Budget ChartField Validation, Bank Statement Has Arrived, and Grace Period Has Expired menu options on the Process Statements page.
List of Merchants	Click the Preferred Vendors link on the Procurement Card Center page.	Define preferred vendors by associating a merchant with a specific vendor.
Review Disputes - Procurement Card Transactions	Click the Review Disputes link on the Procurement Card Center page.	Review and enter comments for disputed transactions.
Correct Errors	Click the Correct Errors link on the Procurement Card Center page.	Review and correct errors for statements loaded to the staging tables.
Reports	Click the Reports link on the Procurement Card Center page.	Generate reports for procurement card summary and exception reporting. Reports include: Account Summary, Cardholder Information, Expected Credits, Purchase Details, Purchase Exceptions, Credit Detail By MCG, Non-Preferred Supplier, Top Supplier Chains, Top Merchant Category, and MCC Exceptions (merchant category code exceptions).
Security	Click the Security link on the Procurement Card Center page.	Define roles, access rights, proxies and SpeedCharts for procurement cards. Menu options include: Register Roles, Assign Access Rights, Assign Proxies, and Assign SpeedCharts.
Definitions	Click the Definitions link on the Procurement Card Center page.	Define procurement card setup data such as card profiles and card-issuing banks. Menu options include: Cardholder Profile, Preferred Vendors, and UOM Mappings.

Navigating in PeopleSoft eProcurement Implementation

PeopleSoft eProcurement provides navigation pages that you can use to find implementation tasks.

Note. In addition to the custom navigation center pages, PeopleSoft eProcurement provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in PeopleSoft eProcurement Implementation

Page Name	*Definition Name*	*Navigation*	*Usage*
Administer Procurement Main	PV_ADM_MAIN	eProcurement, Procurement Application Administration	This page provides links to all functional and technical setup pages that you need to complete the PeopleSoft eProcurement installation.
Procurement Setup Guide - Default	PV_ADM_SETUP_GUIDE	eProcurement, Procurement Application Administration Click the Procurement Setup Guide link. Click the Default link.	PeopleSoft eProcurement delivers the setup guide to provide sequential steps to enable users to implement PeopleSoft eProcurement and link to the pages that define organizational structure in PeopleSoft applications. See Chapter 3, "Determining Technical Implementation Options," page 11. See Chapter 4, "Determining Functional Implementation Options," page 65.

Chapter 3

Determining Technical Implementation Options

This chapter provides an overview of PeopleSoft eProcurement system administration and discusses how to:

- Work with the Administer Procurement component.

- Configure the administration and maintenance pages.

- Set up installations options.

- Set up attachments for transactions.

- Set up event notifications and escalations.

- Maintain system users and roles.

- Maintain approval workflow.

- Maintain supplier integration.

- Run PeopleSoft eProcurement processes.

- Maintain procurement options.

- Maintain the accounting structure.

- Enable ChartField security.

- Integrate with PeopleSoft EnterpriseOne Procurement.

Understanding PeopleSoft eProcurement System Administration

Specific implementation and maintenance tasks are targeted to system administrators. The system contains links to technical setup pages for the overall PeopleSoft implementation.

Many of these links are to the PeopleSoft general installation, PeopleTools, PeopleSoft Workflow approvals pages, and PeopleSoft eProcurement-specific implementation pages.

Working with the Administer Procurement Component

To define eProcurement technical setup, use the Administer Procurement component (PV_ADM_PNL_GRP).

This section discusses how to:

- Access the technical setup pages for implementation.

- Set up an eProcurement setup guide ID and description.

- Work with the setup guide.

- View results for key word searches.

Pages Used to Work with the Administer Procurement Component

Page Name	Definition Name	Navigation	Usage
Administer Procurement	PV_ADM_MAIN2	eProcurement, Administer Procurement	Access the pages that are needed to implement and maintain PeopleSoft eProcurement.
Maintain Procurement Setup Guide ID	PV_ADM_PROJECT	eProcurement, Administer Procurement, Maintain Overall System Options, Setup Guide	Establish setup guide IDs to use a separate checklist for implementation in each department in the PeopleSoft Procurement and Workflow setup guides.
Procurement Setup Guide	PV_ADM_SETUP_GUIDE	eProcurement, Administer Procurement, Procurement Setup Guide, Default	Provide a procedural step-by-step listing of pages that you can review for the initial functional setup of business units, codes, accounting structure, procurement options, vendors, items, and users.
Administer Procurement - Search Result	PV_ADM_SRCH_RESULT	eProcurement, Administer Procurement Click the Search button.	View the results of the search for key words in the title, menu name, or description of an implementation or maintenance page that is linked to the Administer Procurement Main page.

Accessing the Technical Setup Pages for Implementation

Access the Administer Procurement page (eProcurement, Administer Procurement).

Administer Procurement

Description Search: [   ]   [Search]

System Administration

Maintain Overall System Options

Installation Options, File Attachment Servers, Admin Procurement Menu Items and Admin Page Links

Maintain Backbone Interlinks

Jobcodes and Role Definition; Create Operators

Maintain System Users and Roles

Permission Lists, Roles, User Types, User Profile, eProcurement Role Action Assignment

Maintain Workflow

Requisition and Change Request Approval, Approval Escalation, Receipt Notification, Workflow Roles and Approval Users

Maintain Supplier Integration

Marketplace Buyers and Suppliers, Validate and Process CUP (Catalog Upload Process) Data, Direct Connect Suppliers, Define and Build Search Indices

Run eProcurement Processes

Run all eProcurement processes in Requisitions, Purchase Orders, Receiving, Marketplace, Workflow, Pcard, etc.

Administer Procurement page (1 of 2)

Maintain Procurement

Maintain Business Units
TableSet IDs, Purchasing Business Unit definitions and options, etc.

Maintain Codes
Unit of Measure, Locations, Tax, Shipping, Comments, Commodity, File Location, etc.

Maintain Accounting Structure
Accounts, Departments, Products, SpeedCharts, Entry Template, Statistics Code, etc.

Maintain Procurement Options
Requisitions, Purchase Orders, Receiving, and Procurement Cards Setup Options, etc.

Maintain Vendors
Vendor Profile(name, address, contact, location), Vendor Control, Procurement Card Vendors

Maintain Items
Manufacturers, Item Families/Groups, Definition, Purchasing Kits, Approval, etc.

Maintain Procurement Users
User Preferences, Buyers, Requesters, Employee Profile
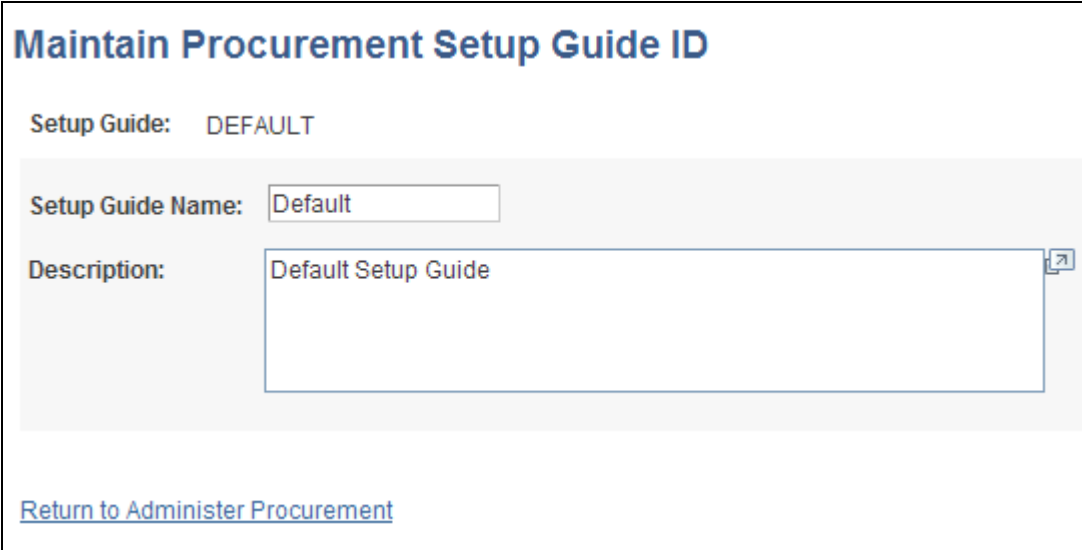
Maintain Catalogs
Maintain Catalog Security and other Catalogs related information.

Administer Procurement page (2 of 2)

This is the main page for implementation and maintenance of PeopleSoft eProcurement. You can redesign this page to fit the organizational structure. To access the System Administration region of this page, the user profile (PeopleTools, Security, User Profiles, User Profiles, Roles) must be linked to the role name, *ePro Admin.*

Setting Up an eProcurement Setup Guide ID and Description

Access the Maintain Procurement Setup Guide ID page (eProcurement, Administer Procurement, Maintain Overall System Options, Setup Guide).

Maintain Procurement Setup Guide ID

Setup Guide: DEFAULT

Setup Guide Name: Default

Description: Default Setup Guide

Return to Administer Procurement

Maintain Procurement Setup Guide ID page

Use this page to establish setup guide IDs to use a separate checklist for implementation in each department in the PeopleSoft procurement and workflow setup guides. Enter the setup guide name and a description in the appropriate fields. Click Save when you are finished.

Working with the Setup Guide

Access the Procurement Setup Guide for *Default* (eProcurement, Administer Procurement, Procurement Setup Guide, Default).

Procurement Setup Guide page (partial page shot)

PeopleSoft eProcurement delivers a setup guide that provides sequential steps that enable users to implement PeopleSoft eProcurement and link to the pages that define organizational structure in PeopleSoft applications. Access the setup guide by entering a setup guide ID. Define separate IDs for different implementation teams, departments, or individuals based on their work tasks. The system is delivered with a default setup guide ID.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Getting Started With PeopleSoft Purchasing," PeopleSoft Purchasing Implementation

Viewing Results for Key Word Searches

Access the Administer Procurement - Search Result page (eProcurement, Administer Procurement. Click the Search button).

Administer Procurement - Search Result page (partial page shot)

Select the Portal Registry option to expand the search for key words to the entire PeopleSoft implementation.

Configuring the Administration and Maintenance Pages

This section provides an overview of how you can modify the administration and maintenance pages to reflect the implementation approach and discusses how to:

- Configure the Administer Procurement Main page.

- Change the setup guide and second-level links for the Administer Procurement Main page.

Understanding How You Can Modify the Administration and Maintenance Pages to Reflect the Implementation Approach

You can change the administration and maintenance pages to reflect the organization's approach to implementation. To do this, PeopleSoft enables you to:

- Reorder the administrative steps.

- Remove some administrative steps.

- Display different page links.

- Rename the titles and links.

Pages Used to Configure the Administration and Maintenance Pages

Page Name	Definition Name	Navigation	Usage
Maintain the Administration Page	PV_ADM_PAGE_TBL	eProcurement, Administer Procurement, Maintain Overall System Options, Maintain the Administration Page	Configure the Administer Procurement Main page: change titles, change descriptions, and reorder steps. Access is limited to users with the SYSTEM_ADMIN eProcurement role action.
Administer Procurement Menu Items Table	PV_ADM_ITEM_TBL	eProcurement, Administer Procurement, Maintain Overall System Options, Maintain Administration Menu Items	Change the second level of links (or steps) for the System Administration region on the Administer Procurement Main page. Access is limited to users with the SYSTEM_ADMIN action role. See Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39.

Configuring the Administer Procurement Main Page

Access the Maintain the Administration Page (eProcurement, Administer Procurement, Maintain Overall System Options, Maintain the Administration Page).

Maintain the Administration Page

Use the administration group values, *System* and *Procurement,* to configure the System Administration and Maintain Procurement regions on the Administer Procurement Main page.

Main Item	Displays the title for each option (group of steps) on the Administer Procurement Main page.
SeqNum (sequence number)	Displays the order in which the steps appear on the Administer Procurement Main page.
Msg Set (message set)	Displays the message catalog that was delivered with PeopleSoft eProcurement.
Msg # (message number)	Displays the message that contains the title and description for each step. You can change the message numbers to use messages that you create.
Menu, Component, and **Market**	Select the component to which you want the user to transfer.

See Also

Chapter 3, "Determining Technical Implementation Options," Understanding PeopleSoft eProcurement System Administration, page 11

Changing the Setup Guide and Second-Level Links for the Administer Procurement Main Page

Access the Administer Procurement Menu Items Table page (eProcurement, Administer Procurement, Maintain Overall System Options, Maintain Administration Menu Items).

Administer Procurement Menu Items Table

Admin Item Code: ADM-02 Description: eProcurement Processes

Administer Procurement Menu Items Table Customize | Find | 🗗 | 🏢 First 🚺 1-7 of 7 🕨 Last

Admin Item Description	Menu Navigation Setup						
Step #	Sub Item	Sub-item Group	Msg Set	Msg #	Menu Item		
2	Buyer Station Processes	NONE	18036	2497	PV_MAIN_MENU	➕	➖
3	MarketSite Processes	NONE	18036	2496	PV_MAIN_MENU	➕	➖
4	Pcard Processes	NONE	18036	2499	PV_MAIN_MENU	➕	➖
5	Receiving and Return to Vendor	NONE	18036	2498	PV_MAIN_MENU	➕	➖
6	Requisition Processes	NONE	18036	1103	PV_MAIN_MENU	➕	➖
7	Workflow Processes	NONE	18036	247	PV_MAIN_MENU	➕	➖
8	Education and Government Proc	EG	18036	365	PV_MAIN_MENU	➕	➖

ℹ️ Message catalog entries are required with the same Sub Item name for the links to be displayed in Administer eProcurement.
Education and Government related processes are grouped under the "EG" Sub-item Group.

Return to Administer Procurement

Administer Procurement Menu Items Table page

After you configure the Administer Procurement Main page, you can define the links that appear on the page.

Admin Item Code (administration item code)	Define a section for the Administer Procurement Main page. Values are:

ADM-01: Accounting.

ADM-02: eProcurement processes.

ADM-03: Backbone Interlink

ADM-04: Business units.

ADM-05: Codes.

ADM-06: Items.

ADM-07: Merchants integration.

ADM-08: Overall system options.

ADM-09: Procurement options.

ADM-10: Publishing rules.

ADM-11: System users and roles.

ADM-12: Vendors.

ADM-13: Workflow.

ADM-14: Procurement users.

ADM-15: Maintain catalogs.

Admin Item Description Tab

Select the Admin Item Description (administration item description) tab.

Step # (step number)	Designates the order in which the steps appear on the Procurement Setup Guide page, which contains this information: business unit, codes, accounting, procurement options, vendors, items, and procurement users.
Sub Item	Assigns a reference name to the steps for this administration item code. For example, *ADM-05* lists sub-item 1 names, such as units of measure, tax codes, and location codes.
Sub-item Group	Lists predefined groups (or subheadings) on the established page. For example, the Maintain Business Units page has two groups (subheadings): General Setup and Setup Purchasing Business Units. The sub-item groups are setID and BU (business unit). You can restrict a sub item by using the Maintain group, which removes it from the admin setup guide but not from the Maintain Business Units page.
Msg Set (message set)	Displays the message catalog that was delivered with PeopleSoft eProcurement.
Msg # (message number)	Displays the message that contains the title and description for each step. You can change the message numbers to use messages that you write.
Menu Items	Defines the location for the step item.

Menu Navigation Setup Tab

Select the Menu Navigation Setup tab.

The fields on this tab link the step to a PeopleSoft table. The bar name establishes a connection to the step table location.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer

Setting Up Installation Options

To set up installation options, use the eProcurement Installation component (PV_INSTALLATION_PV).

This section discusses how to set up PeopleSoft eProcurement installation options.

Pages Used to Set Up Installation Options

Page Name	Definition Name	Navigation	Usage
Installation Options	INST_LINKS	eProcurement, Administer Procurement, Maintain Overall System Options, Installation Options	Access the pages that are used to set overall system-installation options for PeopleSoft Purchasing, PeopleSoft Inventory, and other applications. Access is limited to users with the SYSTEM_ADMIN action role.
eProcurement Installation Options	PV_INSTALLATION_PV	eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options	Set up PeopleSoft eProcurement installation options. Access is limited to users with the SYSTEM_ADMIN action role.

See Also

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine," Setting Up and Running the Verity Search Update Daemon Group Program

Setting Up PeopleSoft eProcurement Installation Options

Access the eProcurement Installation Options page (eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options).

eProcurement Installation Options page

*sProcurement Installation opt. (PeopleSoft Services Procurement installation options)	Select the type of PeopleSoft Services Procurement options that you want to use. You can integrate PeopleSoft eProcurement with PeopleSoft Services Procurement, use PeopleSoft Services Procurement as a standalone application, or elect not to use the PeopleSoft Services Procurement application.

Item Catalog Options

Item Source Option	Select the source for items to be placed on the PeopleSoft eProcurement transactions. Items can come from the item master tables, the express catalog, or both.

Cat Mgmt as ePro Item Source (catalog management as eProcurement item source)	Select to indicate that items from PeopleSoft Catalog Management are to be used as the source.

Requisition Catalog Search

The fields within the Requisition Catalog Search group box are used to configure the item search and catalog browse abilities within the Create Requisition component.

Catalog Search Type	Select the type of catalog and item search to use on the Catalog page in the Create Requisition component. Values are: *TSE* (use tree table): This search engine is limited to a search of the item catalogs that are defined in the PeopleSoft Tree Manager. Only items that are defined in the PeopleSoft Item Master tables are searched, and you cannot define additional search criteria for the environment. This option requires that the Load Tree Data process (PV_TREE_UPDT) be run after any tree, catalog, or category updates. *VSE* (use Verity search engine): The Verity search engine offers faster searches and advanced search options, including the use of Boolean operators. You can use the Verity search engine to search the PeopleSoft Item Master tables, express catalogs, express forms, direct connect suppliers, and business templates. This option requires that the Build Search Index process (PV_IDX_DATA) be run to use the Verity Search Engine.
Search Setting	Click this link to access the Search Settings page. In the Optional Search Fields group box select fields that you will use for Verity search. In the Browse/Search Options group box select the criteria for Verity search. This link is available when VSE is selected in the Catalog Search Type field. See *PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine."
BU Catalog control (business unit catalog control)	To limit the access of item catalogs within certain business units, enter *Y,* and access the Assign Catalog to Business Unit page to set up the item catalogs to use in each business unit. Enter *N* to enable every business unit to access all catalogs. If you are using the rule-based item catalog security feature, use this field and the Assign Catalogs to Business Unit page in coordination with the Catalog Security page. This field does not display if rule based catalogs are activated.

Non Dynamic Range	Select this check box to use non-dynamic range categories for the item search and catalog browse feature within the Create Requisition component. If an item category is marked as a non-dynamic range then the item search returns only those items that belong to the catalogs that the user has access to and are within the item ranges specified in the item categories and sub-categories of the accessible catalogs. In addition, selecting this check box enables the item load processes for CUP file sources and Catalog Management sources to load non-dynamic item ranges defined for a category.
	Un-select this check box to treat all item categories as dynamic ranges within the item search and catalog browse feature of the Create Requisition component. Search results include all items belonging to the specified category and is not limited to any item ranges defined for the category. In addition, un-selecting this check box prevents the item load processes for CUP file sources and Catalog Management sources from loading non-dynamic item ranges.
Override Existing Categories with Item Ranges	Select this check box to enable the item load processes for CUP file sources and Catalog Management sources to change categories from dynamic to non-dynamic when loading items into an existing category. In other words, if items loaded belong to existing categories, these categories will all have non-dynamic item ranges loaded regardless of its original type; a category that was originally a dynamic category, is now changed to non-dynamic with item ranges. Any new categories are created as non-dynamic ranges.
	Un-select this check box to enable the item load processes for CUP file sources and Catalog Management sources to retain the category type (dynamic or non-dynamic) when loading items into an existing category. In other words, if the existing categories have item ranges, then new item ranges are loaded; however, if the existing categories are dynamic, then no new item ranges are loaded. Any new categories are created as non-dynamic ranges.
Max Search Result to Retrieve (maximum search result to retrieve)	Enter the maximum number of values that the system retrieves on page searches. This field only applies to the following pages:
	Search Catalog
	Advanced Search
	Manage Requisitions
	Manage Purchase Orders
	Receipts for a Power User
	Receipts for a Casual User
	Note. If a search returns more rows than you specify, an error message appears.
Max Rows Approval Monitor	Enter the maximum number of requisition lines to be displayed at one time (chunking) in the Review/Edit Approvers section of the workflow approval components and in the Confirmation page of the Create Requisition component. Additional lines can be accessed by using the chunking options at the top of the section, including; using the Next Item button, Last Item button, or entering a range of requisition lines and clicking the Retrieve button. The default for this field is 5.

Allow Saving Direct Connect Items in Favorites and Templates	Select this check box to allow direct connect items to be saved as favorites or as items on a template. This method saves the requester time when creating additional requisitions for the same item.
	Deselect this check box to prevent direct connect items from being added as favorites or template items. Each time the direct connect item is ordered, the requester must use the Web page of the Create Requisition component to access the supplier's online catalog, select the item, and then return to the eProcurement requisition.
Display Approval Chunking	Select this check box to enable chunking on the Review/Edit Approvers section of the workflow approval components and on the Confirmation page of the Create Requisition component. Chunking displays the requisition lines in groups to make large requisition more manageable. The size of the group is determined by the Max Rows Approval Monitor field on this page.

See Also

Chapter 5, "Importing and Searching Supplier Catalogs," Setting Up Catalog Security, page 108

Setting Up Attachments for Transactions

To set up attachments for transactions, use the File Attachments Administration component (PV_ATTACH_ADMIN).

This section provides an overview of transaction attachments and discusses how to:

- Identify servers, component names, and paths for stored attachments.

- Define vendor email addresses for sending attachments.

- Set up locations for storing attachments.

Understanding Transaction Attachments

A transaction attachment is a file that you can attach to a transaction, such as a PeopleSoft eProcurement requisition. The file can be a Microsoft Word file, a Microsoft Excel spreadsheet, a Microsoft PowerPoint presentation, a Microsoft Visio diagram, or any other type of document. Requesters and buyers can view these attachments. The system adds the attachment automatically to the purchase order that is created from the requisition. You can then send these attachments to a vendor.

Note. Other PeopleSoft applications use transaction attachments. This section uses PeopleSoft eProcurement transaction examples, but these examples can apply to any PeopleSoft transaction.

PeopleSoft applications enable you to store attachments to and retrieve attachments from a server. After you set up attachments for the system:

- Requesters can add attachments to their requisitions using header, line, or ship to comments from the Review and Submit page.

- Requesters can add attachments to the receipt header and receipt line using the comment pages from the Receive page.

- Requesters or buyers can view attachments to requisitions using the Requisition Details page and the Requisition Schedule and Distribution page within the Manage Requisitions component.

- Buyers can view attachments to requisitions using the Expedite Requisitions page.

- Buyers can view attachments to purchase orders using the Manage Purchase Orders page.

- Buyers can notify the vendor of an attachment to be sent with the purchase order by running the Notify Vendors of Attachment process (PV_EMAIL_AE).

  This process sends the vendor an email with the purchase order, line number, and attachment.

To add attachments to transactions , you can:

- Use the attachment utility that is provided by PeopleSoft PeopleTools.

  This utility enables the system administrators to control where attachments are stored. Administrators can configure more than one server and change the server settings when needed. This utility standardizes the use of attachments. Users do not need to remember or enter the network path for attachments. This is the recommended method.

- Set up a server location for storing attachments.

  Users manually place their attachments on a file share on the network and add the path to the attachment file into the transaction that they want it associated with. This method uses the URL Maintenance page.

Using the Attachments Utility for Other PeopleSoft Applications

This attachments utility enables you to set up and administer file attachment servers in one component. You no longer need to add code to hold explicit references to URLs or identify the type of database. All of this is accomplished using the Administer Attachment Servers component. You can change the active server at will, without changing code.

Records that you need to store attachments to and retrieve attachments from a PeopleSoft eProcurement requisition have already been defined by PeopleSoft. However, you can design attachments to be used in PeopleSoft Purchasing, PeopleSoft Services Procurement, and PeopleSoft Strategic Sourcing.

Use the completed attachment feature in PeopleSoft eProcurement as an example. Using the PeopleSoft eProcurement example, the basic expectation is that the application has a record in which it stores attached file references. This record is a child of the parent records for the application and appears in a scroll.

To store references to attached files, every application must define a record that is associated with an underlying table. For example, the PeopleSoft eProcurement requisition component has the record PV_REQ_ATTCH in which it stores references to all attached files. Following the usual pattern, this record uses the key fields of its parent records and adds a unique key of its own. This utility expects the applications to have such a record (the attachment reference record for the application).

The attachment reference records must include these two fields: SCM_ATTACH_ID and ATT_VERSION. These two fields are the key fields of the PV_ATTACHMENTS record, which is the central repository of all attachment information.

The PV_ATTACH_NUM field is no longer necessary, although it does not need to be deleted. Include any other field from PV_ATTACHMENTS in the attachment reference record for the application.

When you are designing the user interface, only the user file and description fields should be made visible to the users. For PeopleSoft eProcurement, the work record PV_ATTACH_WRK includes these two fields. Also, if you use the application development framework class, Application Interface, then this work record and the class resolve all persistence issues.

In general, you should enable users to attach more than one file. Use the Line Comments page (PV_REQ_COMMENTS) in PeopleSoft eProcurement as an example of the proper scrolls, buttons, and grids to use. The Line Comments page enables you to add and view attachments using buttons.

The View button is inside the scroll and associated with SCM_ATTACH_WRK.SCM_DOWNLOAD. For the Add button, copy the PeopleSoft eProcurement ATTACHADD field in the work record PV_REQ_WRK, and then change the one piece of the code that refers to PeopleSoft eProcurement:

```
Local Rowset &rs = GetLevel0 () (1). GetRowset (Scroll.REQ_LINE) (&Level1Row).
GetRowset (Scroll.PV_REQ_ATTACH);
```

If you decide that you want to include the Add button inside the grid, the SCM_ATTACH_WRK record provides the SCM_UPLOAD field, which can be bound to an Add button within a grid. In this case, you do not need to add any code. Verify that the attachment reference record for the application is included in the same grid. As long as the system can find an attachment reference record for the application, which includes the fields PV_ATTACH_ID and ATT_VERSION, the utility manages every event, including row insertion, attachment upload, download, and save.

When attachment files are to be stored in a server, PeopleSoft PeopleTools requires the database to have a record structured in a specific way. These delivered records meet these requirements: FILE_ATTDET_SBR for database servers and FILE_ATTACH_SBR for File Transfer Protocol (FTP) servers.

Pages Used to Set Up Attachments for Transactions

Page Name	Definition Name	Navigation	Usage
Administer File Attachments	SAC_ATT_ADMIN	• Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments • eProcurement, Administer Procurement, Maintain Overall System Options, Maintain File Attachment Servers	Identify servers on which to store attachments.
Vendor Address	VNDR_ADDRESS	eProcurement, Administer Procurement, Maintain Vendors, Vendor Information, Address	Define vendor email addresses for sending attachments.

Page Name	Definition Name	Navigation	Usage
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs	Requires end users to enter the file location manually for attachments (not the recommended method).

Identifying Servers, Component Names, and Paths for Stored Attachments

Access the Administer File Attachments page (Set Up Financials/Supply Chain, Common Definitions, File Attachments, Administer File Attachments).

Administer File Attachments page

Attachments to PeopleSoft eProcurement transactions are stored to and retrieved from the server locations that are defined here. System administrators can configure one or more servers to store attachments. These servers can be FTP servers or database servers.

Using this page, system administrators can set up new servers and identify the active server. Administrators can add or modify the FTP root folder and the component-specific subfolder for FTP servers.

Pick Active Server	Select the server ID of the active (or default) server where all newly created attachments are stored. You can switch the active server at any time. All previously created attachments are still retrieved from the server where they originally were stored. The attachments keep a reference to the original server. This field is required.
Add FTP Server (add file transfer protocol server)	Click to insert a new row in the grid to define a new FTP server for attachments.
Add Database Server	Click to insert a new row in the grid to define a new database server for attachments.
ID	Displays the system-assigned ID number for each server on this page. When an attachment is stored to the server, the server ID is inserted into the attachment record. When you request to download (view) this attachment, the system retrieves it from the original server based on the server ID.
Type	Identifies the type of server based on whether you click the Add FTP Server button or the Add Database Server button. After you have saved the row and quit the component, you cannot change the server type. Values are:

- *FTP* (file transfer protocol server).

- *DB* (database server).

Login	Enter or change the login name. This is required for FTP servers only.
Password	Enter or change the password corresponding to the login. The password is required for FTP servers only.
Server/Record Name	Enter a value for both FTP servers and database servers:

- For FTP servers, enter the machine name.

  After you save the information, change the machine name only if the same FTP server is renamed. To add a different FTP server, click the Add FTP Server button to insert a new row into the grid and define the new server. You cannot delete servers because attachments could already be stored on them.

- For database servers, enter the record name of the database in which to store attachments.

  This is the only entry that is needed for database servers. This field automatically changes to PV_ATT_DB_SRV for PeopleSoft eProcurement attachments.

Path	Enter the subdirectory path under the server's FTP root where all attachments are to be stored. This is required for FTP servers only.

Note. You cannot delete a server after you save the row and quit the component. After you quit the component, the system assumes that attachments could already be stored on this server location.

Component Subdirectories

System administrators can use this section to specify a subdirectory under the FTP root for any component. When uploading files, the system looks to this record and uses any subdirectory that is defined. The component subdirectory can be modified at any time. Define the component (in the installed applications) with a subdirectory under the FTP root (FTP servers only).

Component Name   Enter the component for the installed application.

Subdirectory   Enter the subdirectory path.

Defining Vendor Email Addresses for Sending Attachments

Access the Vendor Address page (eProcurement, Administer Procurement, Maintain Vendors, Vendor Information, Address).

Vendor Address page

To send an attachment to the vendor, for the *001* address ID, enter the vendor's email ID address in the Email ID field. When you run the Notify Vendors of Attachments (PV_EMAIL_AE) process, attachments are sent to the vendor email address, along with the purchase order ID and line number. The attachment is sent only after the purchase order is dispatched and published.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information"

Setting Up Locations for Storing Attachments

Access the URL Maintenance page (PeopleTools, Utilities, Administration, URLs).

URL Maintenance page

Use this page to set up a location for storing attachments. This is usually an FTP server. In the root directory, add a subfolder named PV and then give read and write privileges to anonymous users or any users who are specified in the FTP string. For PeopleSoft eProcurement attachments, create a URL identifier that is named PV for the FTP location and then specify the FTP server address. The FTP root location must contain a subdirectory that is named PV.

Setting Up Event Notifications and Escalations

This section provides an overview of notifications and discusses how to:

•   Define notification event types.

•   Set up notification events.

•   Review notification event statuses.

Understanding Notifications

Notifications enable you to create and send a notification to someone. The notifications can be either a worklist item or an email message. Notifications are associated with an overall process, such as a workflow.

Use the Event Notification and Escalation feature to create a process that you can schedule to run at any time, independent of other applications. This feature is an Application Engine program that is called from the PeopleSoft Process Scheduler. You define rules for sending notifications, such as when a workflow approval has gone beyond the time defined for responses. You configure the requesters and approvers who receive the notification using the approval pages of the PeopleSoft application.

The system notifies a specific user using email or invokes an action that is defined in the subscriber system. This system makes the call to an application program interface (API) that is registered by PeopleSoft eProcurement and uses the Event Notification and Escalation feature to:

- Define a notification based on a process and its event type.

  The notification definitions are grouped based on the event type for each process.

- Evaluate whether the condition has been met.

  The system uses polling notifications that it implements through the PeopleSoft Process Scheduler. For each active, configured, and defined notification event, the system takes an action based on the outcome of the evaluation. The system makes an evaluation by:

  - Running a SQL view.

  - Running a query object.

  - Calling a user-defined PeopleCode application class from within an application package.

- Trigger the action that is defined for the user event.

  The action that is taken will be either an email notification that was set up using the PeopleSoft notification template or a user-defined PeopleCode application class. If the action invokes PeopleCode, then the rowset that is returned from the evaluation step is passed into the action step.

- Log errors and exceptions and report notification statuses.

Pages Used to Set Up Event Notifications and Escalations

Page Name	Definition Name	Navigation	Usage
Event Type	PTAF_NEM_EVENTS	• Set Up Financials/Supply Chain, Common Definitions, Notifications and Escalations, Event Types • eProcurement, Administer Procurement, Maintain Workflow, Event Types	Use this page to create a notification event, specify the conditions for which it should check, and specify the actions that the system should take when the notification conditions are met.
Setup Event	PTAF_NEM_SETUP	• Set Up Financials/Supply Chain, Common Definitions, Notifications and Escalations, Setup Event • eProcurement, Administer Procurement, Maintain Workflow, Event Definitions	Set up events.
Status	PTAF_NEM_STATUS	• Set Up Financials/Supply Chain, Common Definitions, Notifications and Escalations, Status • eProcurement, Administer Procurement, Maintain Workflow, Event Status	Use this page to determine whether the system successfully ran the notification event and to delete event logs.

Defining Notification Event Types

Access the Event Type page (eProcurement, Administer Procurement, Maintain Workflow, Event Types).

Event Type page

Event Type	Enter an identifier for the event type. The system uses this value as a prompt value when you set up notification events for applications such as PeopleSoft eProcurement.
Server Name	Select a server on which the notification event should run. You can use an existing PeopleSoft Process Scheduler server or an existing application server. By defining an event to run on a specific sever, you can manage the server's workload. You can also set up an event type to run the same notification event on different servers.

Setting Up Notification Events

Access the Setup Event page (eProcurement, Administer Procurement, Maintain Workflow, Event Definitions).

Setup Event page

Event ID	Displays the unique name that the system uses to identify the current notification event. You enter this value if you are adding an ID.
Event Type	Select the event type. Event types determine which server is going to process the event.
Active	Select to indicate that the current notification is active. If the notification is not active, the system does not run the evaluation condition.
Event Types Description	Displays the user-defined description for this event type.
Recurrence	Displays the interval or frequency that the system uses to poll a notification condition. When a condition is met, the system triggers the action that is defined for the notification.
	The system polls for active notifications to be triggered based on the query object, SQL view, or PeopleCode application class that is defined in the notification condition. The polling interval is part of scheduling and works with the repeat interval that is defined for a specific event type.
Repeat Time	Enter a value for the amount of time that lapses between an evaluation time to the next time that the system polls or evaluates the notification condition. For each configured notification, you can enter a repeat interval. This interval must be a multiple of the scheduled polling frequency.
Evaluation Type	Select how you want the system to evaluate the condition for a notification event. Values are:
	PeopleCode: With this evaluation type, you write code to return the row set that you want. If PeopleCode is chosen as the action step, then the evaluation rowset is passed into the action step for custom processing.
	Query Obj (query object): This a predefined query that you set up using the Query Manager that returns a rowset.
	SQL View: You create SQL views using PeopleSoft Application Designer.
Name	Displays the name of the query object or SQL view, depending on which is selected as the evaluation type.
Action Type	Select the type of action that you want the system to take when a notification condition has been met. Values are:
	PeopleCode: Select an application package and class to perform a custom notification or action.
	Note. If you select *PeopleCode,* the Package and Class fields appear.
	Email: Select to use an email for the notification. When you select this action type, the Email Address and Template Name fields appear.
Package	Select the application package that contains the application class for performing a custom PeopleCode evaluation.
Class	Select an application class that is associated with the application package.

Email Address	Enter an email address for the user that you want to receive this notification. To add multiple email addresses, use commas as delimiters. This field is available only when you select *Email* in the Action Type field.
Template Name	Select an email template that you want to use with this notification event. The template contains instructional text, message, sender, and message priority. You define email templates for use with notification by using the Generic Template Definition page. To access the page, select Set Up Financials/Supply Chain, Approvals, Generic Templates, Generic Template Definition.

Reviewing Notification Event Statuses

Access the Status page (eProcurement, Administer Procurement, Maintain Workflow, Event Status).

Status page

This Event	Click to delete all notification event logs for the event ID that you selected.
All Events	Click to delete all notification event logs for all events.
Date Time Stamp	Used in the Status record to track the results of each instance run.
Matches	Displays the number of rows that are returned from a row set.
Detail	Displays detailed status messages for each notification event.

Maintaining System Users and Roles

This section discusses how to attach role actions to user roles.

User security in PeopleSoft eProcurement is similar to that in other PeopleSoft applications. You can associate permission lists with roles to which user profiles (user IDs) are attached. However, PeopleSoft eProcurement comes with several predefined role actions that restrict or grant user access to certain actions.

The following elements are used to create user access:

- *Permission Lists:* (PeopleTools) Permission lists are the building blocks of user security authorization. A permission list grants a degree of access to a particular combination of PeopleSoft elements, specifying pages, development environments, time periods, administrative tools, personalizations, and so on. This level of access should be appropriate to a narrowly defined and limited set of tasks, which can apply to a variety of users with a variety of different roles. These users might have overlapping, but not identical, access requirements.

- *Roles:* (PeopleTools) A role is a collection of permission lists. You can assign one or more permission lists to a role. The resulting combination of permissions can apply to all users who share those access requirements. However, the same group of users might also have other access requirements that they don't share with each other. You can assign a given permission list to multiple roles.

- *User Profiles:* (PeopleTools) A user profile is a definition that represents one PeopleSoft user. Each user is unique; the user profile specifies a number of user attributes, including one or more assigned roles. Each role that is assigned to a given user profile adds its permission lists to the total that apply to that user.

- *eProcurement Role Actions:* (eProcurement) eProcurement role actions are predefined role actions that restrict or grant user access to certain actions.

The following graphic illustrates the setup of eProcurement security from permission lists, roles, and user profiles to the eProcurement role actions:
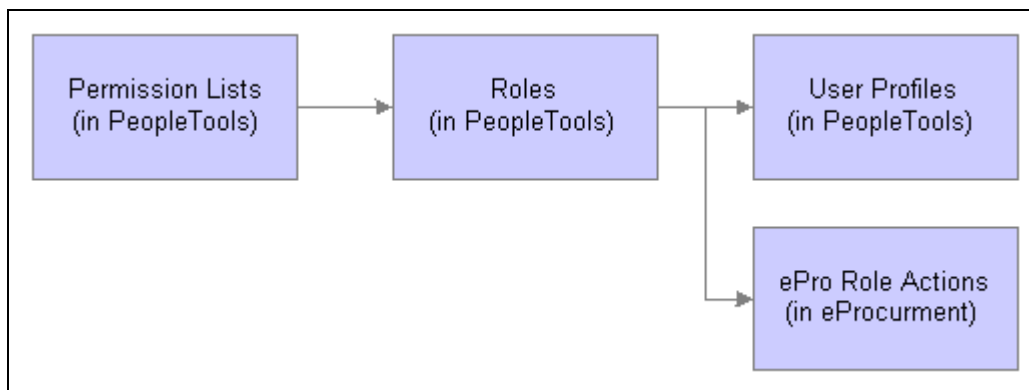
User security setup within PeopleTools and PeopleSoft eProcurement

Users are granted access to certain actions and pages based on their roles. For example, assume we are setting up the user ID VP1 to be an administrator of the eProcurement system. There is a predefined user role named ePro Admin. This role contains permission lists to allow access to vendors, items, business units, Purchasing and eProcurement pages. We can attach this user role to the user ID VP1 using the User Profile-Roles page. Next, within eProcurement, we want VP1 to have access to the System Administration region of the Administer Procurement Main page, therefore; we attach the user role, ePro Admin, to the eProcurement Role Actions page for the action name, SYSTEM_ADMIN.

For more information on PeopleTools user security, see Enterprise PeopleTools 8.50 PeopleBook: Security Administration.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Administering User Profiles"

Enterprise PeopleTools 8.50 PeopleBook: Security Administration, "Understanding PeopleSoft Security"

Page Used to Maintain System Users and Roles

Page Name	Definition Name	Navigation	Usage
eProcurement Role Actions	PV_ACTIONS	eProcurement, Administer Procurement, Maintain System Users and Roles, eProcurement Role Action	Attach role actions to user roles.

Attaching Role Actions to User Roles

Access the eProcurement Role Actions page (eProcurement, Administer Procurement, Maintain System Users and Roles, eProcurement Role Action).

eProcurement Role Actions page

Action Name   Select to restrict or enable access to the users that are associated with the selected role name. Values are:

ALLOWHOLD: Displays the Hold button on requisition approval pages.

ALLOW_ADHOC_ONPREVW : Enables users to add or remove ad hoc approvers on requisition preview.

ALLOW_ADHOC_ONSUBMIT: Allows for adding or removing ad hoc approvers after you submit the requisition.

ALLOW_CHANGE_REQUEST: Users are allowed to edit requisitions and create requisition change requests to a line that has been sourced to a purchase order.

ALLOW_DEFAULT_OPTION: Enables the defaulting options on the Define Requisitions page.

ALLOW_PURGE: Enables database maintenance users to erase transactions with the Purge Staging Table and Purge Change Order Requests options in the Buyer Center.

CANCHANGEALL: Enables a requester to change any field on the requisition without restarting the approval process while the requisition is in a pending approved status.

CANCHANGEDISTRIB: Enables the requester to change any field on the requisition distribution without restarting the approval process while the requisition is in a pending approved status.

CANCHANGEHEADER: Enables the requester to change any field on the requisition header without restarting the approval process while the requisition is in a pending approved status.

CANCHANGELINE: Enables the requester to change any field on the requisition line, with the exception of quantity and price, without restarting the approval process while the requisition is in a pending approved status.

CANCHANGESCHEDULE: Enables the requester to change any field on the requisition schedule without restarting the approval process while the requisition is in a pending approved status.

CANLINKWO: Enables a requester to manually link a requisition schedule to a work order. All the work order fields will be accessible on the requisition schedule page.

CHANGEREQBU: Enables users to change the requester and business unit of a requisition. This action is necessary to purchase something on behalf of another requester.

DCSUPPLIER_SECURITY: Enables catalog security for direct connect suppliers.

ENFORCE_RGN_SECURITY: Enforces the regional security on a requisition by restricting the ship to ID to the requisition default ship to ID. A requester cannot change the ship to ID on the requisition.

EXPRESSFORM_SECURITY: Enables catalog security to be applied to express forms.

EXPRESSREQ_ENTRY: Authorizes the use of the Express Requisition form on the Create Requisition Component.

ITEM_NOTIFICATION: Provides the user with a worklist notification for a new item request. An item request is created from the Create Requisition - Special Request - Special Item page.

MASS_APPROVER: Enables a requester to approve multiple requisitions at one time. The Approve Requisitions component is where the actions are enabled.

MULTI_COMMENTS: Enables a requester to add multiple comments to a requisition or a receipt.

NOVICEREQSTR: Provides a quick-access interface for requisitions where novice requesters can add an item, have the quantity of one added, and display the Summary page. In addition, when a requisition is changed this role action hides the track batch (change batch) number that reflects the number of changes made to a requisition.

NO_CASUAL_RECV: Prohibits users from accessing the PeopleSoft eProcurement receiving pages. The default access value grants all users access to the casual user receiving pages. This action revokes the default access.

NO_DEFAULT_RESULT: Causes no default search results to appear on the Manage Requisition page or the Receipts For a Casual User page.

NO_ONETIME_SHIPTO: Disable access to the one-time ship to address fields. This role action prevents a user from entering a one-time ship to address on a requisition and also prevents the user from viewing the one-time address on the Managing Requisitions component.

PRICEANDAVAILCHECK: Enables users to initiate a price and available quantity check for items from a marketplace.

RECV_BY_SHIPTO: Enables users to receive all purchase orders that are sent to their default ship to address.

RECV_CASUAL_ALL: Enables users on casual user receiving pages to cancel receipts, view purchase order details, and edit receipts that are not closed or canceled.

When requesters or users are assigned the RECV_CASUAL_ALL role actions, they can receive only against purchase order lines that they created. For example, if after the original requisition is sourced to a purchase order and someone else creates a new purchase order line afterward, the requester won't be able to receive against the newly added purchase order line. Only if the requester creates the new purchase order line, either by sourcing a new requisition line to the existing purchase order or by creating a requisition change request using the Manage Requisitions page, can the person subsequently receive against the new purchase order line.

RECV_POWER: Switches users from the casual user receiving pages to the PeopleSoft Purchasing receiving pages. This action is for receiving or purchasing department users.

RESTRICT_INV: Enables a requester to see inventory items and ordering units of measure only when Verity is installed. No vendor information will be shown.

SYSTEM_ADMIN: Enables users to access the System Administration region of the Administer Procurement Main page.

TEMPLATE SECURITY: Applies catalog security to public templates.

VAT_DETAILS: Enables you to view the Value Added Tax (VAT) schedule and distribution details, and to override VAT related fields.

VIEW_ALL_VENDORS: Enables users to view all vendors when browsing or searching. When this action is disabled, the user can only view priority vendors based on the ITM_VENDOR table. To use regional-based sourcing, this action must be enabled.

VIEW_INVENTORY_ICON: Controls the display of the Inventory Item button on the item search Result pages. If you have this role action, the button appears if the item is set as an inventory item in the Item Master table.

VIEW_ORDERING_UOM: Enables you to view the ordering unit of measures for an item on the Requisition Item Description page.

VIEW_REQ_CYCLE: Enables a requester to view the requisition cycle on a separate page from an option on the Manage Requisition page. Normally, a requester views this information from the Manage Requisition page on the requisition lifespan.

*WF_EXPAND_APPROVER:*Enables users to always see the Review/Edit Approvers section in the eProcurement Approval page as expanded.

Note. If a user does not have the *WF_EXPAND_APPROVER,* action associated with their role, the Review/Edit Approvers section will be collapsed by default when the user is approving a requisition.

Note. Not all PeopleSoft eProcurement actions are designed to be attached to users. Some PeopleSoft eProcurement actions should be attached to the eProcurement Business Unit Actions page, including *DCSUPPLIER_SECURITY, EXPRESSFORM_SECURITY,* and *TEMPLATE_SECURITY.*

See Also

Maintaining Approval Workflow

PeopleSoft eProcurement uses the Approval Workflow Framework for requisition approval rather than the standard PeopleSoft Workflow. For more information, refer to the "Using the Approval Workflow Framework in PeopleSoft eProcurement" chapter of this PeopleBook.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook*

Maintaining Supplier Integration

This section provides an overview of supplier integration and discusses how to maintain supplier integration.

Understanding Supplier Integration

The Maintain Supplier Integration page supplies links to set up third-party suppliers to PeopleSoft eProcurement. If you are planning to pass purchase orders from PeopleSoft eProcurement to the Oracle Supplier Network, a supplier's website, or to a marketplace, then use these pages to synchronize the applications.

See Also

Chapter 9, "Integrating with Direct Connect Suppliers," page 203

PeopleSoft Enterprise Managing Items 9.1 PeopleBook, "Working with Items," Defining Custom Item Attributes

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine"

Page Used to Maintain Supplier Integration

Page Name	Definition Name	Navigation	Usage
Maintain Supplier Integration	PV_ADM_MARKETSITE	eProcurement, Administer Procurement, Maintain Supplier Integration	Maintain supplier integration. Access the pages that you use to set up direct connect supplier integration and marketplace integration. Access is limited to users with the SYSTEM_ADMIN action role.
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers	Setup third-party suppliers as PeopleSoft vendors. Third-party suppliers can include suppliers from the Oracle Supplier Network, marketplace, direct connect vendors, and catalog management suppliers.

Maintaining Supplier Integration

Access the Maintain Supplier Integration page (eProcurement, Administer Procurement, Maintain Supplier Integration).

Maintain Supplier Integration

Marketplace Integration

Menu	Description
Correct Item Load Errors	Correct Inventory Item Load Errors
EDX PO Dispatch Types	Define types of the EDX PO Dispatch method
Integration Data Value Mappings	Integration Data Value Mappings
Marketplace Buyers	Maintain Marketplace Buyers
Marketplace Registration	Register as a Trading Partner with a Marketplace
Linked Suppliers	Maintain Linked Suppliers
Marketplace Test	Transmit a predefined Purchase Order to a Marketplace using a predefined test supplier.
Import Item Catalog File	Import External Item Catalog Data
Validate and Process Imported Items	Validate and Process Imported Items

Item Attributes

Menu	Description
Attribute Name Cross Reference	Maintain Attribute Name Cross-Reference
Attributes Staging Table	Verify attributes data imported in the Staging Table
Category Attributes	Maintain category attributes loaded from Marketplace
Import Attributes	Import Attributes to Staging Table from a File
Item Attributes	Maintain item attributes loaded from Marketplace
Load Attributes	Load Attributes from the Staging Table to the Category and Item Attributes Tables.

Maintain Supplier Integration page (1 of 3)

Express Forms

Menu	Description
Maintain Express Form Profile	Maintain Express Form Profile

Direct Connect

Menu	Description
Direct Connect Methods	Define Direct Connect integration methods & standards
Integration Broker Integration Point Wizard	Integration Broker Integration Point Wizard
Integration Broker Node Definitions	Define Integration Broker Node Definitions
Integration Broker Routing Definitions	Define Integration Broker Routings
Integration Broker Service Definitions	Define Integration Broker Services
Integration Broker Service Operation Definitions	Define Integration Broker Service Operations
Supplier Value Cross-Reference	Supplier Value Cross-Reference

Maintain Supplier Integration page (2 of 3)

Search Indexes	
Menu	**Description**
Build eProcurement Verity Collection	Build eProcurement Verity Collection for search type "VSE". Verity Search Engine will be used for the item catalog search in creating eProcurement Requisitions.
Define Data Objects	Define Data Objects
Define Data Object Set	Define groups of data objects which represent the relationship among source tables.
Define Search Indexes	Define search indexes and fields.
Build Search Index	Build Search Index
Define Search Query	Define search query structure and fields
Define Search Result	Define search result to map query result to component structure
Define Search Options	Define search options available for the Search Engine framework.
Maintain Verity Thesaurus	Create a new thesaurus or modify existing thesaurus for item searching.

Return to Administer Procurement

Maintain Supplier Integration page (3 of 3)

Use these pages to navigate to other pages to set up suppliers and marketplace integration.

Using the Linked Suppliers page

Access the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers).

Linked Suppliers

Linked Suppliers

Type: MarketPlace Supplier
SetID: SHARE   CORPORATE SETID
Vendor ID: 0000000044   Location: STANDARD

EDX PO Dispatch Type: [   ] 🔍
PO Dispatch Node: [   ] 🔍
Linked Supplier ID: [   ]
Linked Supplier Name: [   ]
Identifier Type: [   ] ▽
Buyer Account Code: [   ]
Direct Connect Method: [   ] 🔍
Direct Connect Node: [   ] 🔍

Return to Administer Procurement

A linked supplier with the Marketplace Supplier type is used to connect to a marketplace or to the Oracle Supplier Network

A linked supplier with the Direct Connect Supplier type is used to connect to a vendor's website.

A linked supplier with the Catalog Management Supplier type

Use the Linked Suppliers page to connect a PeopleSoft vendor ID to a third-party vendor such as suppliers from the Oracle Supplier Network (OSN), marketplace, direct connect vendors, and catalog management suppliers.

Type	Select the type of supplier that the SetID, Vendor ID, and Location represents. Options include:

    • *Catalog Management Supplier*

      Select to set up links for a catalog management supplier.

      See <u>Chapter 5, "Importing and Searching Supplier Catalogs," page 99.</u>

    • *Direct Connect Supplier:*

      Select to set up links for a direct connect supplier.

      See <u>Chapter 9, "Integrating with Direct Connect Suppliers," page 203.</u>

    • *MarketPlace Supplier:*

      Select to set up links for a marketplace supplier or for a supplier within the Oracle Supplier Network.

      See <u>Chapter 8, "Integrating with a Marketplace," page 155.</u>

      See <u>Chapter 7, "Integrating with the Oracle Supplier Network," page 141.</u>

Vendor ID and **Location**

Select the PeopleSoft vendor and vendor location that you wish to link to a third-party vendor.

Note. If a PeopleSoft vendor was previously linked, it can't be linked to another node. That vendor does not appear in the Vendor ID prompt.

EDX PO Dispatch Type (electronic data transfer purchase order dispatch type)

Define the format of the purchase order document to be dispatched to a vendor's website, the Oracle Supplier Network, or a marketplace. Your entry in this field determines what fields are editable on the rest of this page; for example, if you select OAG72 (for an OSN supplier) then the system enables the fields needed to link a PeopleSoft vendor to an OSN supplier.

The options are:

    • *CXML12:* to use the cXML format.

    • *OAG72* to use the OAG format to integrate to the Oracle Supplier Network.

    • *XCBL30.* to use the xCBL format.

PO Dispatch Node (purchase order dispatch node)

Select the node to be used for the dispatch type. This is used in the dynamic dispatching process.

If you are using the BPEL Process Manager to integrate with suppliers, select *BPEL.*

See <u>Chapter 14, "Dispatching Purchase Orders in PeopleSoft eProcurement," Setting Up Dynamic Dispatching, page 391.</u>

Linked Supplier ID (OSN or marketplace supplier only)	Define the supplier ID for:

- The supplier within the Oracle Supplier Network. This is the OSN supplier company ID.

- The supplier within a marketplace. Enter the 64-bit universal identifier for a marketplace trading partner. Supplier participant ID's are defined within a marketplace and cannot be changed.

The system uses ID's to identify the supplier of an item when transferring information. This is a required field for an OSN or marketplace integration. No validation is performed on this field value, if data is incorrect or missing then the integration will fail.

Linked Supplier Name (OSN or marketplace supplier only)	Enter the name of the OSN or marketplace supplier.
Trading Partner ID (catalog management supplier only)	The identification number of the supplier that provides item catalogs to be loaded into PeopleSoft eProcurement.
Trading Partner Name (Catalog Management Supplier only)	The name of the catalog management supplier.
Identifier Type (OSN supplier only)	Enter the partner type defined for this supplier in OSN. The options are:

1. *DUNS:* DUNS number

2. *GLN:* Global location number

3. *MISC:* Miscellaneous number

4. *PHONE:* Telephone number

5. *TAXID:* U.S. Federal Tax Identifier

Buyer Account Code (marketplace supplier only)	Enter the account code that is used by a marketplace supplier that identifies the PeopleSoft eProcurement buyer.
Direct Connect Method (OSN supplier, marketplace supplier, or direct connect supplier)	Select the direct connect method that you want to use in order to do business with this vendor. Options include:

- *PUNCHOUT:* uses the cXML 1.2.008 standard.

- *ROUNDTRIP:* uses the xCBL standard based off of the OCI 2.0b spec.

- *ROUNDTRIP MP* (RoundTrip to a marketplace)

- *EXCH_ORACLE* (PunchOut to Exchange.oracle.com)

Direct Connect Node (OSN supplier, marketplace supplier, or direct connect supplier)	Select the node that is associated with this vendor, marketplace, or the Oracle Supplier Network.

Note. You associate each Linked Supplier with its specific Direct Connect Node. It is a one-to-one relationship. You may not associate several Linked Suppliers to a single Direct Connect Node.

Setting Up Supplier Properties

Access the Supplier Properties page (Select the Supplier Properties tab from the Linked Suppliers page).

Supplier Properties page

Supplier properties store the details of how a particular supplier interacts with a direct connect method and identifies some of the information that the supplier expects to be sent in the XML. You can also enter a default value for each field on the requisition line for this particular supplier's direct connect items.

You can enter default information for items that are returned from the direct connect supplier on this page. This default value only applies to a field if the supplier sends a null value for that field in the service operation passed back to PeopleSoft; otherwise, the supplier's value overrides the defaults.

Load Direct Connect Properties   Click to load the property name and descriptions of the direct connect method specified on the Linked Suppliers page.

Running PeopleSoft eProcurement Processes

This section provides an overview of eProcurement Processes and discusses how to run PeopleSoft eProcurement processes.

Understanding the eProcurement Processes

PeopleSoft eProcurement has grouped the standard processes that you can run. These processes include:

- Procurement processes that include, for example, dispatching purchase orders, expediting requisitions, quick sourcing requisitions, and running inventory demand.

- Marketplace processes, which include building the Verity search collection of items, loading items, and importing item catalogs.

- Procurement card processes that work with bank statements and vouchers.

- Receiving and return-to-vendor processes that include processing and loading receipts, Workflow notification, and reconciling return-to-vendor items.

- Requisition processes that include reconciling requisitions, reopening closed requisitions, and building item search indexes.

Page Used to Run PeopleSoft eProcurement Processes

Page Name	Definition Name	Navigation	Usage
Run eProcurement Processes	PV_ADM_ALL_PROCESS	eProcurement, Administer Procurement, Run eProcurement Processes	Run PeopleSoft eProcurement processes. Access is limited to users with the SYSTEM_ADMIN eProcurement role action.

Running PeopleSoft eProcurement Processes

Access the Run eProcurement Processes page (eProcurement, Administer Procurement, Run eProcurement Processes).

Run eProcurement Processes page

Use this page to navigate to other pages where you can run standard eProcurement processes.

Maintaining Procurement Options

Procurement options control a variety of requisition, purchase order, receiving, and procurement card information.

This section discusses how to:

• Assign catalogs to a purchasing business unit.

• Set up return to vendor instructions.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Defining Procurement Options"

Pages Used to Maintain Procurement Options

Page Name	Definition Name	Navigation	Usage
Assign Catalogs to Business Unit	PV_REQ_BU_CAT	eProcurement, Administer Procurement, Maintain Procurement Options, Assign Catalog to BU	Assign catalogs to a PeopleSoft Purchasing business unit. Limit the items that are available to a user by restricting the user to an item catalog. You can also restrict user access to items by attaching item catalogs to the requester on the Requester's Setup page.
Purchasing Kit Definition	PURCH_KIT_TBL	eProcurement, Administer Procurement, Maintain Procurement Options, Purchasing Kits	Set up item purchasing kits for requisitions. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Requisitions Online," Ordering Kit Items.
Setup Instructions for Return to Vendor	PV_RTV_ADMIN	eProcurement, Administer Procurement, Maintain Procurement Options, Return to Vendor Instructions	Set up return to vendor instructions.

Assigning Catalogs to a Purchasing Business Unit

Access the Assign Catalogs to Business Unit page (eProcurement, Administer Procurement, Maintain Procurement Options, Assign Catalog to BU).
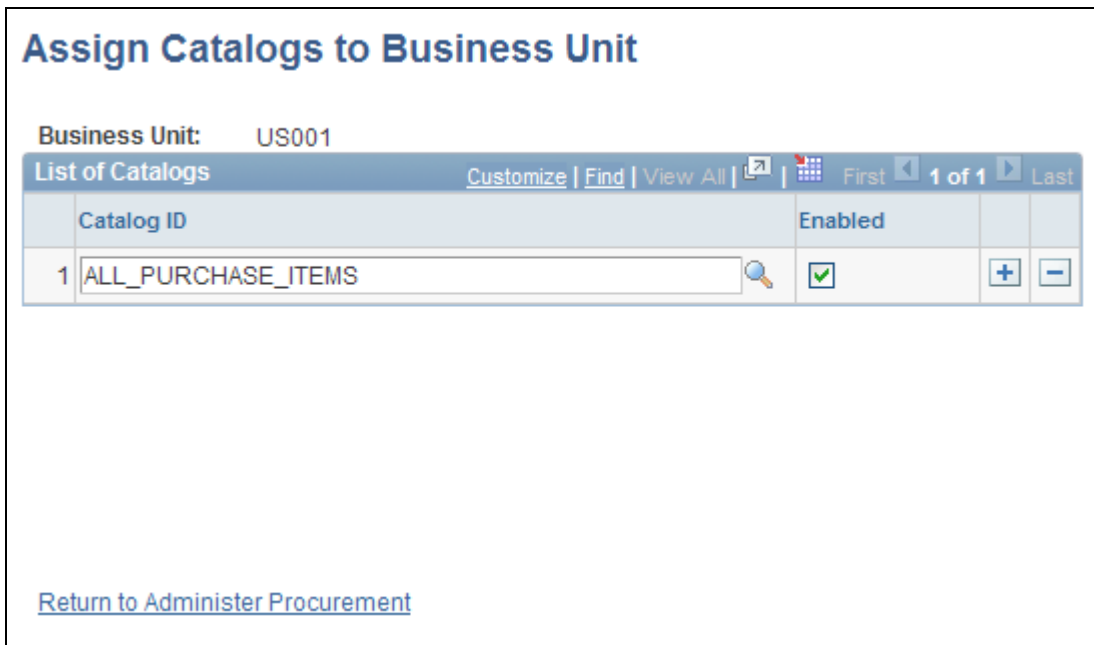
Assign Catalogs to Business Unit page

Business Unit	Enter a business unit to which you are assigning catalogs. Any user who enters PeopleSoft eProcurement requisitions using this business unit can select only the items in the catalogs that appear in the Catalog ID field.
Catalog ID	Enter item catalogs.
Enabled	Select to indicate that the item catalog is available to requesters that are associated with this business unit.

Note. To enable the entries on this page, enter *Y* in the BU Catalog Control (business unit catalog control) field on the eProcurement Installation Options page. If you are using the rule-based item catalog method, use this page in combination with the Catalog Security page.

See Chapter 5, "Importing and Searching Supplier Catalogs," Setting Up Catalog Security, page 108.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Defining Procurement Options"

Setting Up Return to Vendor Instructions

Access the Setup Instructions for Return to Vendor page (eProcurement, Administer Procurement, Maintain Procurement Options, Return to Vendor Instructions).

Setup Instructions for Return to Vendor

SetID: SHARE   [Add]

                                                                    < 1-2 of 2 >

Instr. Code: General Instruction (top)   [Delete]

RTV
Instruction: Notify billing department. Include receipt number and invoice number.

Instr. Code: Items shipped from Inventory   [Delete]

RTV
Instruction: Note reason for return on the packing slip.

Return to Administer Procurement

Setup Instructions for Return to Vendor page

Instr. Code (instruction code)	Select how you want instructions to appear on the Return to Vendor page. Values are:
	General Instructions (top): At the top of the page under the first heading.
	Return Qty Shipped to Vendor (return quantity shipped to vendor): Below the shipment and vendor information heading if the return to vendor status is *Shipped.*
	Saved confirmation page text: When you click the Save button on the Return to Vendor page.
	Ship Qty instruction (ship quantity instruction [bottom]): Below the shipment and vendor information heading, if the return to vendor status is *Open.*
RTV Instruction (return to vendor instruction)	Enter the instruction details for the instruction that you selected in the Inst. Code field.

Maintaining the Accounting Structure

This section discusses how to maintain the accounting structure.

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Defining and Using ChartFields"

Page Used to Maintain the Accounting Structure

Page Name	Definition Name	Navigation	Usage
Maintain Accounting Structure	PV_ADM_ACCOUNTING	eProcurement, Administer Procurement, Maintain the Accounting Structure	Use the Maintain Accounting Structure page to view and maintain accounting information for PeopleSoft eProcurement to record the transactions in the general ledger. Accounting personnel should define these codes. Access is limited to users with the SYSTEM_ADMIN action role.

Maintaining the Accounting Structure

Access the Maintain Accounting Structure page (eProcurement, Administer Procurement, Maintain the Accounting Structure).

Maintain Accounting Structure page

Use this page to navigate to other pages and view and maintain accounting information for PeopleSoft eProcurement. You can record transactions in the general ledger and set up the different ChartField combinations that meet the needs of the business.

Enabling ChartField Security

PeopleSoft enables you to restrict access to your financial data within PeopleSoft eProcurement and across all PeopleSoft Financials Supply Chain Management (FSCM) applications. The ChartField Security feature prevents unauthorized employees and contractors from viewing and editing financial data. Other security features within PeopleSoft enable you to restrict access by business unit, ledger, setID, paycycle, book code, and project ID; however, the ChartField Security feature enables you to restrict access to specific financial data by restricting access to a ChartField value or combination. Security by ChartField combination enables you to allow access to most financial data (such as inventory accounts or accounts payable balances) and still restrict access to sensitive data (such as executive salaries or travel accounts). Using ChartField security, you can enable access to sensitive ChartField combinations by:

- User IDs

- User roles

- Permission lists

ChartField security is implemented at the component level. Occasionally there may be a component that is shared by two different products. PeopleSoft Purchasing and PeopleSoft eProcurement share components, such as the requisition component. In these cases, ChartField security must be implemented in both products in order to be active in either product.

The following methods can be used to enforce ChartField security:

- *Securing the prompt edit table values:* When a user clicks the prompt button or enters a value in a field containing a ChartField (Account, Department ID, and so on), then the system only displays values that the user is authorized to view.

- *Securing inquiry results list:* When a user is entering a component, the search results are limited to transactions containing ChartField combinations that the user is authorized to view.

- *Securing transactions from a component search list:* When a user is entering a component, the search results display all applicable transactions; however, if the user selects a transaction containing a restricted ChartField combination, then an error message is displayed and the user cannot access the transaction.

- *Securing drills to transaction component:* When a user is on the component, the search results display all applicable information; however, if the user selects a link to drill down into a more detailed page with restricted ChartField combination, then an error message is displayed and the user cannot access the additional information.

Based on the structure of the component, one or more of the above security methods can be implemented for a single component.

The following pages and components in PeopleSoft eProcurement can be restricted with ChartField security:

- Create Requisition component (securing the prompt edit table values). This component can also be accessed from the Manage Requisitions component.

- Approve Requisitions component (securing drills to transaction components).

- Approval Status component (securing drills to transaction components).

- Expedite Requisitions component (securing drills to transaction components).

• Requisition Schedule and Distribution component (securing drills to transaction components).

• Receive Items component (securing drills to transaction components).

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Securing ChartFields"

Integrating With PeopleSoft EnterpriseOne Procurement

PeopleSoft Enterprise eProcurement can exchange data with PeopleSoft EnterpriseOne Procurement (JD Edwards). You can use this integration to:

• Send purchase orders from PeopleSoft Enterprise to PeopleSoft EnterpriseOne.

• Send purchase order changes from PeopleSoft Enterprise to PeopleSoft EnterpriseOne.

• Send a purchase order hold status release message from PeopleSoft EnterpriseOne to PeopleSoft Enterprise.

• Notify PeopleSoft EnterpriseOne of purchase orders dispatched from PeopleSoft Enterprise

• Notify PeopleSoft Enterprise of purchase orders dispatched from PeopleSoft EnterpriseOne

• Send receipts from PeopleSoft Enterprise to PeopleSoft EnterpriseOne.

• Send receipts from PeopleSoft EnterpriseOne to PeopleSoft Enterprise.

• Send purchase order closes from PeopleSoft EnterpriseOne to PeopleSoft Enterprise.

To enable this integration, the PeopleSoft Enterprise product uses EIPs (enterprise integration points) and the PeopleSoft Integration Broker. PeopleSoft EnterpriseOne uses XPI Integration Server (IS) and XBPs, which include z-file interfaces, canonicals, and other PeopleSoft EnterpriseOne integration points.

Before using these integration points, you must synchronize the master data between the two systems, such as item IDs, suppliers, and accounts.

Note. For complete information on the setup and use of this integration, see the "Integrating PeopleSoft Enterprise eProcurement with PeopleSoft EnterpriseOne Procurement" white paper located within the My Oracle Support website.

See https://support.oracle.com/CSP/ui/flash.html.

Pages Used to Integrate With PeopleSoft EnterpriseOne Procurement

Page Name	Definition Name	Navigation	Usage
Purchase Order EIP	SAC_INTG_R_CNTL	eProcurement, Manage ERP Integration, Purchase Order EIP	Enter criteria to launch the SAC_POEIPPUB process. This PeopleSoft Application Engine process is used to publish approved purchase orders created within the PeopleSoft Enterprise system. This enables the purchase orders to be received by the PeopleSoft EnterpriseOne system.
Voucher EIP	SAC_INV_R_CNTL	eProcurement, Manage ERP Integration, Voucher EIP	Enter criteria to launch the SAC_APEIPPUB process. This PeopleSoft Application Engine process is used to publish vouchers created within the PeopleSoft Enterprise system. This enables the vouchers to be received by the PeopleSoft EnterpriseOne system.
Receipt EIP	SAC_RCPT_RUNCTL	eProcurement, Manage ERP Integration, Receipt EIP	Enter criteria to launch the SAC_RCPT_PUB process. This PeopleSoft Application Engine process is used to publish receipts created within the PeopleSoft Enterprise system. This enables the receipts to be received by the PeopleSoft EnterpriseOne system.
External Invoices	SAC_INV_EXT	eProcurement, Manage ERP Integration, External Invoices	View external invoices.
External Payments	SAC_PMT_EXT	eProcurement, Manage ERP Integration, External Payments	View external payments.
External PO Error Acknowledge	SAC_POERR_NOTIFY	eProcurement, Manage ERP Integration, External PO Error Acknowledge	View the external purchase order acknowledgements (POAs) that are in error.
External PO Status	SAC_ERP_PO_STS	eProcurement, Manage ERP Integration, External PO Status	View the status of external purchase orders.

Page Name	Definition Name	Navigation	Usage
External Receiver Status	SAC_ERP_RECV_STS	eProcurement, Manage ERP Integration, External Receiver Status	View the status of external receipts.

Chapter 4

Determining Functional Implementation Options

This chapter provides an overview functional implementation options and discusses how to:

- Maintain business units.

- Set up and maintain codes.

- Maintain vendors.

- Maintain items.

- Maintain catalogs.

- Set up profiles.

- Set up and maintain users.

Understanding eProcurement Functional Implementation Options

Use the eProcurement - Administer Procurement page to navigate to all necessary pages that you use to maintain procurement options. Every link that you need to set up and maintain procurement options can be located from this central navigational page.

Maintaining Business Units

To define business units, use the eProcurement Business Unit Actions component (PV_ACTIONS_BU), the eProcurement Business Unit Options component (PV_BUS_UNIT_PM), the Record Group component (REC_GROUP_TABLE), and the tableset ID component (SETID_TABLE).

PeopleSoft eProcurement requires a purchase order business unit because the system uses the business unit as a key field when recording transactions.

This section discusses how to:

- Create a PeopleSoft Purchasing business unit.

- Create relationships between business units, setIDs, and record groups.

- Define PeopleSoft General Ledger business units.

- Define business unit options for PeopleSoft eProcurement.

Note. You can also access many of the pages that are listed in the Set Up Financials/Supply Chain menu within the Business Unit Related option.

Pages Used to Maintain Business Units

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Business Units	PV_ADM_SETUP_BU	eProcurement, Administer Procurement, Maintain Business Units	View a list of links that you use to navigate to other pages to set up and maintain business unit information.
Business Unit Definition	BUS_UNIT_TBL_PM	Click the Purchasing Definition link on the Maintain Business Units page.	Create a PeopleSoft Purchasing business unit.
Business Unit Options	BUS_UNIT_TBL_PM2	Click the Purchasing Definition link on the Maintain Business Units page. Then select the Business Unit Options tab.	Define business unit options.
PO Approval Options (purchase order approval options)	BUS_UNIT_PO_APPR	Click the Purchasing Definition link on the Maintain Business Units page. Then select the PO Approval Options tab.	Define purchase order approval options.
Document Numbering	BUS_UNIT_TBL_PM3	Click the Purchasing Definition link on the Maintain Business Units page. Then select the Document Numbering tab.	View document numbering. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Understanding Business Units in PeopleSoft Purchasing.
Record Group	REC_GROUP_TABLE	Click the Record Group link on the Maintain Business Units page.	Add a record group. After adding the group, use the TableSet Control feature to create relationships.

Page Name	Definition Name	Navigation	Usage
TableSet Control - Record Group	SET_CNTRL_TABLE1	Click the TableSet Control link on the Maintain Business Units page.	Group record definitions for the tables that you want to share, as well as any dependent record definitions. This creates relationships between setIDs, business units, and record groups. See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration, "Using the PSADMIN Utility"*
TableSet Control - Tree	SET_CNTRL_TABLE2	Click the TableSet Control link on the Maintain Business Units page. Then select the Tree tab.	Associate the Set Control Value with trees.
TableSet ID - TableSet Control	SETID_TABLE	Click the TableSet ID link on the Maintain Business Units page.	Use this page to create setIDs.
AM Business Unit Definition (asset management business unit definition)	BUS_UNIT_TBL_AM	Click the Asset Mgmt Definition (asset management definition) link on the Maintain Business Units page.	Create a PeopleSoft Asset Management business unit and specify its default processing options. See *PeopleSoft Enterprise Asset Management 9.1 PeopleBook*, "Implementing Asset Management."
Open Period Update	OPEN_PERIOD_SINGLE	Click Update Open Periods on the AM Business Unit Definition page.	Define in which periods transactions can be posted for Asset Management.
Warehouse Mapping	AM_WAREHOUSE_MAP	Click Warehouse Mapping on the AM Business Unit Definition page.	Establish the default ChartField mapping rules that are necessary to accommodate asset-component changeout-transfers for this business unit.
VAT Defaults Setup (Value Added Tax Defaults Setup)	VAT_DEFAULTS_DTL	Click VAT Default on the AM Business Unit Definition page.	Setup defaults for VAT.
VAT Defaults Copy (Value Added Tax Defaults Copy)	VAT_DFLT_SRCH_COPY	Click Copy Defaults From on the VAT Defaults Setup page.	Copy VAT default specifications from another key combination for the same VAT driver.

Page Name	Definition Name	Navigation	Usage
Business Unit/Book Definition	BU_BOOK_DEFN_01	Click the Asset Mgmt Definition link on the Maintain Business Units page. Then select the Business Unit/Book Definition tab.	Define required books, book options, and accounting entry options for each book that the business unit will use. **Note.** You must first complete the AM Business Unit Definition page and define the asset books on the Asset Book page.
BU Book ChartFields Summarize	BU_BOOK_GRP_SUM	• Click the Asset Mgmt Definition link on the Maintain Business Units page. • Select the Business Unit/Book Feature tab. • Select the Group Asset Processing check box on the Business Unit/Book Definition page.	(Optional) Select the ChartFields that will be used to summarize assets by a group member.
Round Options	ROUND_OPTIONS_SEC	Click Round Type on the Business Unit/Book Definition page.	(JPN) Select options for rounding depreciation amounts for the book.
Depreciation Close List	MR_AM_DEPR_CLOS	Click Depreciation Close List on the Business Unit/Book Definition page.	Review the years and periods for which depreciation has been closed.
General Ledger - Definition	BUS_UNIT_TBL_GL1, BUS_UNIT_TBL_GL2, BUS_UNIT_TBL_GL3, BUS_UNIT_TBL_GL4, BUS_UNIT_TBL_GL6	Click the General Ledger Definition link on the Maintain Business Units page.	Define PeopleSoft General Ledger business units. See *PeopleSoft Enterprise General Ledger 9.1 PeopleBook*, "Defining Your Operational Structure," Understanding General Ledger Business Units and Options.

Page Name	Definition Name	Navigation	Usage
General Ledger - Currency Options	BUS_UNIT_TBL_GL3	Click the General Ledger Definition link on the Maintain Business Units page. Then select the Currency Options tab.	Specify currency options at the business unit level for currency balancing; base currency adjustment, and the number of foreign currencies for each journal. See *PeopleSoft Enterprise General Ledger 9.1 PeopleBook*, "Defining Your Operational Structure," Defining Currency Options for a Business Unit.
Ledgers For A Unit - Currency Options	BUSINESS_UNIT_LED3	Set Up Financials/Supply Chain, Business Unit Related, General Ledger, Ledgers For A Unit, Currency Options	Indicate how you want to record adjusting entries for out-of-balance conditions that are caused by foreign currency rounding. See *PeopleSoft Enterprise General Ledger 9.1 PeopleBook*, "Defining Your Operational Structure," Defining Currency Options for a Business Unit.
Rounding Adjustment ChartFields	BUL_JE_RA_CFS_SEC	Click the Rounding Adjust ChartFields link on the Ledgers For A Unit - Currency Options page.	Specify ChartField options when an unbalanced condition exists between the debit and credit rows. This results when the system converts and then rounds a value from a foreign amount to a base amount. See *PeopleSoft Enterprise General Ledger 9.1 PeopleBook*, "Defining Your Operational Structure," Understanding General Ledger Business Units and Options.
Purchasing Processing Options	BUS_UNIT_OPT_PM	Click the Processing Options link on the Maintain Business Units page.	Define purchasing transaction processing criteria. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."

Page Name	Definition Name	Navigation	Usage
Dispatch Method	BU_OPT_PM_DISP	Click the Dispatch Method link on the Purchasing Processing Options page.	Define transaction dispatch methods for purchase orders, request for quotes (RFQs), return to vendors (RTVs), contracts, and replenishment requests. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."
Freight Option	BU_OPT_PM_FREIGHT	Click the Freight Option link on the Purchasing Processing Options page.	Define freight options, rule codes, and charge methods. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."
VAT Defaults Setup (value-added tax defaults setup)	VAT_DEFAULTS_DTL	Click the VAT Default link on the Purchasing Processing Options page.	Define VAT default options for all transactions in a business unit. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."
Service VAT Treatment Defaults Setup (service value-added tax treatment defaults setup)	VAT_DEFAULTS_DTL	Click the VAT Service Treatment Setup link on the Purchasing Processing Options page.	Define service-related VAT default options for service transactions in a business unit. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."
POA Settings (purchase order acknowledgements settings)	POA_DEF_BU_SP	Click the POA Settings link on the Purchasing Processing Options page.	Define POA requirements and tolerance settings. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options."
eProcurement Business Unit Options	PV_BUS_UNIT_PM	Click the eProcurement Business Unit Options link on the Maintain Business Units page.	Define business unit options for PeopleSoft eProcurement.

Page Name	Definition Name	Navigation	Usage
eProcurement Business Unit Actions	PV_ACTIONS_BU	Click the eProcurement Business Unit Actions link on the Maintain Business Units page.	Identify the PeopleSoft eProcurement actions that should be used for each business unit. The applicable PeopleSoft eProcurement actions enable security for items from the business template, express forms, and direct connect suppliers.

Creating a PeopleSoft Purchasing Business Unit

Access the Business Unit Definition page (eProcurement, Administer Procurement, Maintain Business Units. Click the Purchasing Definition link on the Maintain Business Units page).

Business Unit Definition page

All PeopleSoft eProcurement transactions are recorded in a PeopleSoft Purchasing business unit. Set up a PeopleSoft Purchasing business unit even if you are not using PeopleSoft Purchasing (standalone mode).

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options"

Creating Relationships Between Business Units, SetIDs, and Record Groups

Access the TableSet Control - Record Group page (eProcurement, Administer Procurement, Maintain Business Units. Click the TableSet Control link on the Maintain Business Units page).

TableSet Control - Record Group page

If you are integrating with a marketplace, use the TableSet Control - Record Group page to link the PeopleSoft eProcurement record group PV_01 as a marketplace buyer.

Note. Before altering this page, you should have a clear understanding of tablesets, record groups, and relational database concepts. Please see your database administrator before making changes.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options"

Defining PeopleSoft General Ledger Business Units

Access the General Ledger - Definition page (eProcurement, Administer Procurement, Maintain Business Units. Click the General Ledger Definition link on the Maintain Business Units page).

General Ledger - Definition page

Set up a PeopleSoft General Ledger business unit even if you are not using the PeopleSoft General Ledger system.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options"

Defining Business Unit Options for PeopleSoft eProcurement

Access the eProcurement Business Unit Options page (eProcurement, Administer Procurement, Maintain Business Units. Click the eProcurement Business Unit Options link on the Maintain Business Units page).

eProcurement Business Unit Options page

Enable Req Region Security (enable requisition region security)	Select to indicate that requisitions for this business unit have regional security. This means that the result of an item search from a requisition displays only those items and vendors that are relevant to the regions for a requester.
Allow Req Change in Purchasing (allow requisition change in purchasing)	Select to indicate that you can change requisitions added in PeopleSoft eProcurement (that is, having a SYSTEM_SOURCE of EPO) using the PeopleSoft Purchasing components. A eProcurement requisition can be altered in PeopleSoft Purchasing; however, a requisition added in PeopleSoft Purchasing cannot be altered using PeopleSoft eProcurement components.

Allow Changes to Dispatched PO

Select to enable users to create a change request when the requisition line has been source to a purchase order and the purchase order has already been dispatched. This value is overridden by the same option on the linked supplier's Supplier Properties page (i.e. ALLOW_PO_CHNG = N).

Un-select to prevent users from creating a change request when the purchase order has already been dispatched.

Workflow Approval Required

Select to indicate that requisitions and change requests for this business unit must go through the approval workflow framework before the requisition is set to the status of approved. If this same check box is selected on the PeopleSoft Purchasing business unit then the approval workflow framework is turned on for both Purchasing and eProcurement and this check box on this page is unavailable. Selecting the Workflow Approval Required check box on the eProcurement business unit but not the Purchasing business unit turns on the approval workflow framework only in PeopleSoft eProcurement; in this case, if you edit an eProcurement requisition within a Purchasing component, the approval process is not triggered. Keep in mind that a requisition added in PeopleSoft eProcurement can be changed using the PeopleSoft Purchasing components only if you have selected the Allow Req Change in Purchasing check box on this page. A requisition added in PeopleSoft Purchasing cannot be altered using PeopleSoft eProcurement components.

See Chapter 15, "Using the Approval Framework in PeopleSoft eProcurement," page 403.

Resubmit Workflow for Quantity or Price Decrease

Select this check box to require the approval of a change request with a decrease in item quantity or price. When a requisition is changed to increase the item quantity or price, then the system automatically requires approval of the change request.

Item Source

Select the catalog source for this business unit. Items can come from the item master tables, the express catalog, or both. This field is available for selection when the Item Source Option on the eProcurement Installation Options page is set to *Master and Express Items.*

Show PO Acknowledgements Icon (show purchase order acknowledgements icon)

Select to display the POA icon on the requisition cycle. This icon can be used to view a purchase order acknowledgement received from a vendor. The requisition cycle can be viewed on the Manage Requisitions page or the Requisition Cycle for: <requester> page.

Show ASN Icon (show advanced shipping notice icon)

Select to display the ASN icon on the requisition cycle. This icon can be used to view an advanced shipping notice (ASN) recieve from a vendor. The requisition cycle can be viewed on the Manage Requisitions page or the Requisition Cycle for: <requester> page.

Integration Type

Select the type of integration that you will be using. Examples are Oracle, PeopleSoft 8.4, and SAP.

PO ID Scheme (purchase order ID scheme)

Select the purchase order ID scheme that you will be using. Examples are PO ID - User Defined and PO ID by Business Unit.

Integration Option	Select an option to control how the business unit acts for requisitions. Values include:

Do Not Consolidate: Select to have the system create all requisition lines for this business unit with the Do Not Consolidate field set to *Yes.*

External Invoices: Select to indicate the requisition cycle sources invoice data from a set of staging tables that can be populated from an external accounting system.

External Payments: Select to indicate the requisition cycle sources payment data from a set of staging tables that can be populated from an external accounting system.

External Receiving: Select to indicate the requisition cycle sources receiving data from a set of staging tables that can be populated from an external system.

No Deletion After Integration: Select to indicate that deletions will not occur after the integration processes are run.

One Distribution per Schedule: Select to indicate that users cannot create requisitions with multiple distributions per schedule.

One Schedule per Line: Select to indicate that users cannot create requisitions with multiple schedules per line.

Peoplesoft PO ID Used (PeopleSoft purchase order ID used): Select to indicate that the external system will have the same purchase order ID as the PeopleSoft order when integrating with an external system.

Note. You can select more than one integration option by adding rows to the Integration Options group box.

Setting Up and Maintaining Codes

To set up and maintain codes, use these components:

- Carrier (CARRIER_TBL).

- Currency Code (CURRENCY_CD_TABLE)

- File Location (FILE_LOC_GBL)

- Freight Terms (FREIGHT_TERMS)

- Location Definition (LOCATION_TBL)

- Reason Code (REASON_CD)

- Ship To (SHIP_TO_CODES)

- Ship Via (SHIP_VIA_CD)

- State (STATE_DEFN)

- Standard Comment (STD_COMMENT_TYPE)

- Tax Authority (TAX_AUTHORITY)

- Tax Code (TAX_CODE)

- Unit of Measure (UNITS_OF_MEASURE)

This section provides an overview of purchasing codes and lists the pages used to set up and maintain codes.

Understanding Purchasing Codes

Purchasing codes control information that is used during the purchasing process. Examples of these codes include carrier, currency, and commodity codes, as well as freight, location, and tax codes.

If you are using supplier integration, be sure that the country, currency, and units of measure codes that you define are the same as those that appear on the supplier's website. Use International Organization for Standardization (ISO) standards.

Note. You can also access many of the pages that are listed in the following table by selecting Setup Financials/Supply Chain, Common Definitions and Setup Financials/Supply Chain, Product Related.

Pages Used to Set Up and Maintain Codes

Page Name	Definition Name	Navigation	Usage
Maintain Codes	PV_ADM_SETUP_CODES	eProcurement, Administer Procurement, Maintain Codes	View a list of links that are used to navigate to other pages to set up and maintain purchasing codes.
Carrier	CARRIER_TBL	Click the Carrier link on the Maintain Codes page.	Define the carriers that the organization uses to move freight.
Std Comm Type (Standard Comment Type)	STD_COMM_TYPE_PO	Click the Comment Types link on the Maintain Codes page.	Define standard comment types to use to identify the purpose of a particular comment.
Standard Comments	STD_COMMENTS_PO	Click the Comments link on the Maintain Codes page.	Create standard comments that can be assigned to a purchase order.
Commodity Code	COMMOD_CODE	Click the Commodity Codes link on the Maintain Codes page.	Define commodity codes. Commodity codes, which are also called freight classes, are used on bills of lading to group and identify shipped products for freight rating and insurance purposes.

Page Name	Definition Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Click the Countries link on the Maintain Codes page.	Add or review country descriptions.
Address Format	ADDR_FORMAT_TABLE	Click the Countries link on the Maintain Codes page. Then select the Address Format tab.	Select address fields for a country so that the system displays addresses in the appropriate format.
Currency Code	CURRENCY_CD_TABLE	Click the Currency Codes link on the Maintain Codes page.	Define the currencies that you will be using in the eProcurement application.
File Locations	FILE_DIR_FS	Click the File Locations link on the Maintain Codes page.	Define file extensions that you want the system to recognize, system locations for transaction attachments, email and fax file extensions, and file server directories.
Freight Terms	FREIGHT_TERMS	Click the Freight Terms link on the Maintain Codes page.	Set up freight terms.
Location Definition	LOCATION_TBL	Click the Location Codes link on the Maintain Codes page.	Define a location code, such as a branch office or shipping office.
Location Detail	LOCATION_TBL2	Click the Location Codes link on the Maintain Codes page. Then select the Location Details tab.	Add details to a location definition.
Reason Codes	REASON_CD	Click the Reason Codes link on the Maintain Codes page.	Define reason codes, which provide explanations for occurrences such as returned stock and changes to order headers, lines, or schedules. For example, you might set up a reason code called CUST-CA for orders that have been canceled at the customer's request. You can also define return and reject reason codes for items that are received in PeopleSoft Purchasing.
Ship To Locations	SHIPTO_HDR	Click the Ship To Locations link on the Maintain Codes page.	Associate the sourcing region with the appropriate ship to location.

Page Name	Definition Name	Navigation	Usage
Sales Use Tax	SUT_DFLT_TBL	Click the Ship To Locations link on the Maintain Codes page. Then click the Sales/Use Tax link.	Enter default sales and use tax information for each ship to location. The sales and use tax rates are normally based on the final destination of the shipment (the ship to location).
Ship To Vendor Order Location	SHIPTO_VNDR_LOC	Click the Ship To Locations link on the Maintain Codes page. Then click the Vendor Order Location link.	Associate ship to vendor locations with the vendor order locations, setIDs, and vendor ID.
Ship Via Codes	SHIP_VIA_CD	Click the Shipping Methods link on the Maintain Codes page.	Set up shipping codes.
State	STATE_DEFN	Click the States link on the Maintain Codes page.	Add or review a state or province codes.
Tax Authorities	TAX_AUTHORITY	Click the Tax Authorities link on the Maintain Codes page.	Add to or update sales and use tax authorities.
Tax Codes	TAX_CODE	Click the Tax Codes link on the Maintain Codes page.	Add or update sales and use tax codes.
Units of Measure	UNITS_OF_MEASURE	Click the Units of Measure link on the Maintain Codes page.	Establish units of measure for the resources.

Maintaining Vendors

To maintain vendors, use the Maintain Vendor URLs (PV_VNDR_URL_MAINT), Procurement Card Issuers (CC_CARD_TBL), Vendor Control (VENDOR_CONTROL), and Vendor Information (VNDR_ID) components.

This section discusses how to enter URLs for vendor websites.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Managing Procurement Cards"

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information," Entering Vendor Identifying Information

Pages Used to Maintain Vendors

Page Name	Definition Name	Navigation	Usage
Maintain Vendors	PV_ADM_VNDR	eProcurement, Administer Procurement, Maintain Vendors	Access the pages that you use to maintain vendors.
Maintain Vendor Hyperlinks	PV_VNDR_URL_MAINT	Click the Maintain Vendor URLs link on the Maintain Vendors page.	Enter URLs for vendor websites. Click the Vendor link on the Item Description page to access that vendor's website.
Card Issuer	CC_CARD_TBL	Click the Procurement Card Issuers link on the Maintain Vendors page.	Set up a procurement card vendor that is associated with a PeopleSoft Payables vendor.
Vendor Set Control	VNDR_CNTRL	Click the Vendor Control link on the Maintain Vendors page.	Set up vendor control data, such as auto numbering, VAT information, wait days, and duplicate vendor checking.
Summary	VNDR_ID1_SUM	Click the Vendor Information link on the Maintain Vendors page.	View summary information about a vendor, including who created the vendor, when the record was last modified, and by whom. **Note.** This page appears only after you have saved a vendor.
Identifying Information	VNDR_ID1	Click the Vendor Information link on the Maintain Vendors page. Then select the Identifying Information tab.	Enter identifying information for a vendor, including the vendor name and short name, classification, status, persistence, withholding and VAT eligibility, relationships with other vendors, setting to check for duplicate invoices, and additional identifying elements that are required for reporting to government agencies.

Page Name	Definition Name	Navigation	Usage
VAT Registration Details (value-added tax registration details)	VNDR_VAT_RGSTRN	Click the Registration link on the Identifying Information page.	Specify VAT registration information for all the countries with which the vendor is registered to do business.
VAT Defaults Setup (value-added tax defaults setup)	VAT_DEFAULTS_DTL	Click the VAT Default link on the Identifying Information page.	Specify and review VAT default settings at the vendor level.
Service VAT Treatment Default Setup (service value-added tax treatment default setup)	VAT_DEFAULTS_DTL	Click the VAT Service Treatment Setup link on the Identifying Information page.	Specify and review VAT default settings for VAT on services at the vendor level.
General Information - General Info	CUST_GENERAL1	Click the Bill To Customer Details link on the Identifying Information page.	Define bill to-customer information.

Note. The Bill to Customer Details link is available only if you can automatically create bill to customers from the Vendor component. |
| Vendor User | VENDOR_USER | Vendors, Vendor Information, Add/Update, Vendor User | Identify users who are authorized to access vendor information. |

Entering URLs for Vendor Websites

Access the Maintain Vendor Hyperlinks page (eProcurement, Administer Procurement, Maintain Vendors. Click the Maintain Vendor URLs link on the Maintain Vendors page).

Maintain Vendor Hyperlinks

	SetID	Vendor ID	Vendor Name	Vendor Home Page
1	SHARE	0000000044	Mel's Diner	http://
2	SHARE	0000000045	Robert Half	http://
3	SHARE	0000000046	Onsight Inc	http://
4	SHARE	0000000047	Tiger Services	http://
5	SHARE	AUS0000001	Computers Unlimited	http://
6	SHARE	AUS0000002	Northern Computers	http://
7	SHARE	AUS0000003	Romulus High Tech Suppliers	http://
8	SHARE	AUS0000004	Corporate Business Technology	http://
9	SHARE	AUS0000005	Techno City Wholesalers	http://
10	SHARE	AUS0000080	Withholding Applicable vendor	http://
11	SHARE	AUS0000090	Australian Tax Office	http://
12	SHARE	AUS0000099	Australia Operations Interunit Vendor	http://
13	SHARE	AUSCOMP	Computers Unlimited Pty Ltd	http://
14	SHARE	BLG0000001	Multi Media Corp	http://
15	SHARE	BLG0000002	WPT Computer Supplies	http://

Maintain Vendor Hyperlinks page

To enter the URL for a vendor's website:

1. Click the Update Vendor List button to display the vendors within the designated setID.

    This button disappears after the vendors appear.

2. In the Vendor Home Page field, enter the URL for the vendor.

3. Click the Save button to save the work.

4. Click the Vendor link on the Search Catalog page to access the vendor's website.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information," Entering Vendor Identifying Information

Maintaining Items

This section provides an overview of item maintenance and lists the pages used to maintain items.

Understanding Item Maintenance

You can establish the items that are used on PeopleSoft eProcurement requisitions, purchase orders, and other transactions. You can also perform these tasks:

• Assign one or multiple item catalogs to a business unit.

• Define item categories and purchasing attributes, such as primary buyer, receiving controls, and price tolerances.

• Define item families.

• Define item groups.

• Set up item number control, which enables the system to assign sequential item IDs.

• Add and maintain manufacturer information about an item.

• Approve new items and define their definitions, their units of measure, and their ship to locations.

• Maintain item prices and their purchasing attributes.

• Set up purchasing kits for items and load tree data for item catalogs.

• Maintain item and purchasing attribute fields that trigger the Verity online update process.

• Build the Verity search engine for searching item catalogs when creating PeopleSoft eProcurement requisitions.

Note. You can also access many of the pages that are listed in the following table by selecting Items, Define Controls and Items, Define Items and Attributes.

Pages Used to Maintain Items

Page Name	Definition Name	Navigation	Usage
Maintain Items	PV_ADM_DEFINE_ITEM	eProcurement, Administer Procurement, Maintain Items	View links to navigate to pages to maintain items. Access is limited to users with the SYSTEM_ADMIN action role. See *PeopleSoft Enterprise Managing Items 9.1 PeopleBook.*

Page Name	Definition Name	Navigation	Usage
Assign Catalogs to Business Unit	PV_REQ_BU_CAT	Click the Assign Catalog to BU link on the Maintain Items page.	Assign one or multiple item catalogs to a business unit.
Item Categories - Category Definition	CATEGORY_TBL	Click the Item Categories link on the Maintain Items page.	Define item categories.
Update Catalog Tree	CAT_PNLS_CATLG_SEC	• From the Item Categories - Category Definition page, change item categories or add a new item category and then click Save. • From the Item Categories - Category Definition page, click the Yes button when asked if you want to update catalogs with the category changes.	Select the catalog tree to update with new category code information.
BU Specific Attributes (business unit specific attributes)	ITM_CAT_BU_SEC	Click the BU Attributes (business unit attributes) link on the Item Categories - Category Definition page.	Assign a buyer to this category for each business unit. You may want to do this if you order by description and want a default buyer for this category by business unit. This setup is optional. The system uses the values that are set up for the buyer at the item category level for all business units that are not specified here.
View Catalog Hierarchy	CAT_PARENTAGE_SEC	Click the Hierarchy link on Item Categories - Category Definition page.	View information about where a category resides in the entire catalog tree hierarchy.

Page Name	*Definition Name*	*Navigation*	*Usage*
Item Categories - Category Definition 2	CATEGORY_TBL2	Click the Item Categories link on the Maintain Items page. Then select the Category Definition 2 tab.	Define the matching and receiving controls, sourcing controls, and miscellaneous controls and options for the category. Also use this page to set price tolerance defaults for items to trigger workflow exception notifications. PeopleSoft Purchasing and PeopleSoft Payables use matching controls to match receipts, purchase orders, and vouchers. Receiving controls specify how receiving users process items that are assigned to this category. These values become a part of the item default hierarchy and can be displayed in purchase order lines where this category is specified.
Vendor Sourcing Priorities	ITM_CAT_VND_PR_SEC	Click the Priorities link on the Item Categories - Category Definition 2 page.	Set the vendor priority and split sourcing allocation percentage for vendors for this category.
Item Families	PROD_FAMILY_INV	Click the Item Families link on the Maintain Items page.	Establish item family options.
Item Groups	INV_ITEM_GROUP	Click the Item Groups link on the Maintain Items page.	Group similar items together.
Item Number Control	ITEM_NBR_CONTROL	Click the Item Numbering Controllink on the Maintain Items page.	Define whether new inventory items are sequentially numbered or manually numbered.
Manufacturers	MANUFACTURER	Click the Manufacturers link on the Maintain Items page.	Select a default universal item ID for a manufacturer, and determine whether the manufacturer is locally owned.
Item Approval	INV_ITEM_APPROVAL	Click the Item Approval link on the Maintain Items page.	Manually approve item definitions that you create at the setID level.

Page Name	Definition Name	Navigation	Usage
Define Item - General: Common	INV_ITEMS_DEFIN1	Click the Item Definition link on the Maintain Items page.	Define an inventory item at the setID level.
Define Item - Item Image	INV_ITEM_IMAGE_SEC	Click the Item Image link on the Define Item - General: Common page.	Maintain an image of an item.
Define Item - Manufacturer's Item	ITM_MFG_SP	Click the Manufacturers link on the Define Item - General: Common page.	Define information about the manufacturer of the item.
Define Item - General: Classifications	INV_ITEMS_DEFIN4	Click the Classifications link on the Define Item - General: Common page.	Continue defining attributes for the item.
Define Item - General: Dimensions	INV_ITEMS_DEFIN3	Click the Dimensions link on the Define Item - General: Common page.	Track the item's dimensions, size, and color.
Define Item - General: Usage	INV_ITEMS_DEFIN8	Click the Usage link on the Define Item - General: Common page.	Define material usage attributes for an item at the setID level.
Define Item - Inventory: Tracking/Description	INV_ITEMS_DEFIN2	Access the pages in the Define Item component, and then select the Inventory tab.	Establish or maintain item descriptions and lot-control attributes.
Define Item - Inventory: Shipping/Handling	INV_ITEMS_DEFIN5	Click the Shipping/Handling link on the Define Item - Inventory: Tracking/Description page.	Establish or maintain shipping and handling attributes.
Define Item - Substitutes	INV_ITEMS_DEFIN7	Access the pages in the Define Item component, and then select the Substitutes tab.	Establish or maintain substitute items.
Define Item - Configuration	INV_ITEMS_DEFIN6	Access the pages in the Define Item component, and then select the Configuration tab.	Define item-distribution and production-configuration attributes if you are using PeopleSoft Product Configurator.
Define Item - Custom: Character	INV_ITEMS_DEFIN9	Access the pages in the Define Item component, and then select the Custom tab.	Define alphanumeric field values at the setID level for item attributes that are unique to the enterprise.

Page Name	Definition Name	Navigation	Usage
Define Item - Custom: Numeric	INV_ITEMS_DEFIN10	Click the Numeric link on the Define Item - Custom: Character page.	Define numeric field values at the setID level for item attributes that are unique to the enterprise.
Units of Measure	INV_ITEM_UOM	Click the Item Units of Measurelink on the Maintain Items page.	Assign a unit of measure (UOM) to an item. For each item-UOM combination that you define, specify quantity precision and rounding rules for use in system calculation.
UOM Weight/Volume (unit of measure weight and volume)	INV_ITEM_WTVOL	Click the UOM Weight/Volume link on the Units of Measure page.	Assign default packing codes and stocking and shipping physical measurements to an item-UOM combination.
Global Trade Item Numbers	ITM_MFG_GTIN_SP	Click the Global Trade Item Number link on the Units of Measure page.	Assign a GTIN to the item-UOM combination using a locally owned EAN/UCC Company Prefix (manufacturer).
Price Adjustment	PRICE_ADJUSTMENT	Click the Price Adjustment link on the Maintain Items page.	Define the rules that the system should follow when calculating the vendor-adjusted price from the vendor's base price. You can define effective-dated adjustment rule sequences for each item-vendor combination.
Price Adjustment Details	PRICE_ADJUST_DTLS	Access the pages in the Price Adjustment component, and then select the Price Adjustment Details tab.	Define the quantities and adjustment methods for each of the price adjustment rules.
Purchasing Attributes	ITM_TBL_PUR	Click the Purchasing Attributes link on the Maintain Items page.	Enter basic purchasing information for an item.
Item Specifications	ITEM_SPEX_PUR	Click the Item Specifications link on the Purchasing Attributes page.	Record standard details about the item. You can send these specifications to the vendor using the purchase order.

Page Name	Definition Name	Navigation	Usage
Packing Details	ITM_PKG_PUR_SEC, ITM_VUOM_PKG_SEC	Click the Packing Details link on the Purchasing Attributes page.	Enter packing volume and weight information for the item. When accessed from the Vendor's UOM and Pricing Info (vendor's unit of measure and pricing information) page, the Packing Details page also enables you to define item package dimensions, which can be useful if item package dimensions vary by vendor.
VAT Defaults Setup (value-added tax defaults setup)	VAT_DEFAULTS_DTL	Click the VAT Default link on either the Purchasing Attributes page or the Purchasing Business Unit Attributes page.	Enter VAT defaults for this item into the VAT hierarchy tables.
VAT Service Treatment (value-added tax service treatment)	VAT_DEFAULTS_DTL	Click the VAT Service Treatment Setup link on either the Purchasing Attributes page or the Purchasing Business Unit Attributes page.	Enter service-related VAT defaults for this item into the VAT hierarchy tables.
Purchasing Attributes - Purchasing Controls	ITM_TBL_PUR2	Access the pages in the Purchasing Attributes component, and then select the Purchasing Controls tab.	Specify matching and receiving defaults for the item. Define sourcing controls and miscellaneous controls and options for the item. Set price tolerance defaults for purchased items. These tolerances are populated based on the category of the item. You can override them during online item setup. Use these tolerances in conjunction with the price-change exception-rule. Item Load processes compare new item and vendor prices in the Item Loader staging table to the previous item and vendor price. If the new price exceeds tolerances, the system generates an exception.

Page Name	*Definition Name*	*Navigation*	*Usage*
Purchasing Business Unit Attributes	ITM_BU_PUR	Click the BU Attributes (business unit attributes) link on the Purchasing Attributes - Purchasing Controls page.	Define item attributes by business unit. If you do not specify tolerance values for the business unit, the system uses tolerance values that are defined for the purchasing attributes of the item. When you access this page to specify business-unit specific attributes, tolerance values are derived from the purchasing attributes of the item. To define zero tolerances on this page, you must clear the tolerance fields manually. If you access this page and enter a business unit, but do not enter any values and click OK to quit the page, the system uses tolerance values from the purchasing attributes to create business-unit specific values. Click Cancel instead to avoid this situation. The fields on this page match those on the Purchasing Attributes page and on the Purchasing Definition - Business Unit Options page. This page is not available unless at least one of the PeopleSoft Purchasing business units has the Allow Business Item Attributes option selected on the Purchasing Definition - Business Unit Options page.
Purchasing Attributes - Item Vendor	ITM_VENDOR	Access the pages in the Purchasing Attributes component, and then select the Item Vendor tab.	Establish and update prioritized item-supplier combinations.
Vendor Search	VENDOR_LOOKUP_SEC	Click the Vendor Lookup link on the Purchasing Attributes - Item Vendor page.	Search for vendors.

Page Name	*Definition Name*	*Navigation*	*Usage*
Vendor's UOM and Pricing Info (vendor's unit of measure and pricing information)	ITM_VENDOR_UOM	Click the Item Vendor UOM (item vendor unit of measure) link on the Purchasing Attributes - Item Vendor page.	Establish valid units of measure to use when ordering the item from the vendor and to establish the pricing information for each valid UOM.
Effective Dated UOM (effective dated unit of measure)	ITM_VNDR_UOMCHG	Click the Effective Dated UOM link on the Vendor's UOM and Pricing Info page.	Enter effective-dated conversion rate changes along with the packing detail information.
Update Purchase Order	PO_EDUOM_UPDPO_SEC	Click the Update PO link on the Vendor's UOM and Pricing Info page or the Effective Dated UOM page.	Update existing purchase order schedules with the new effective-dated UOM conversion rate changes.
Maintain Purchase Order - Purchase Order	PO_LINE	Click the PO Number link on the Update Purchase Order page.	Maintain the purchase order and all of its details.
Vendor's Manufacturer Info (vendor's manufacturer information)	ITM_VENDOR_MFG	Click the Vendor Item MFG (vendor item manufacturer) link, on the Purchasing Attributes - Item Vendor page.	Record the authorized manufacturers for an item-vendor combination.
Vendor Item Return Fees	ITM_VND_RTV_FEE	Click the Return to Vendor Fees link on the Purchasing Attributes - Item Vendor page.	Add fees that were charged by the vendor for returning this item.
Item Vendor Contracts	ITM_VNDR_CNTRCT	Click the Item Vendor Contracts link on the Purchasing Attributes - Item Vendor page.	View all contracts for any specified item and vendor combination.
Purchasing Kit Definition	PURCH_KIT_TBL	Click the Purchasing Kits link on the Maintain Items page.	Define purchasing kits.
Load Tree Data	PV_RUN_SRCH_UPDT	Click the Load Tree Data link on the Maintain Items page.	Load tree data for item catalogs. This process is necessary for the TSE (Tools Search Engine) and VSE (Verity Search Engine) search types.

Page Name	Definition Name	Navigation	Usage
Build Search Index	PV_IDX_RUN_CTRL	Click the Build eProcurement Verity Collection link on the Maintain Items page.	Enter run control parameters for the Build eProcurement Verity Collection process for search type VSE. This search index is used for the item catalog search when you are creating eProcurement Requisitions.
eProcurement New Item Request	PV_ITEM_REQUEST	Click the eProcurement New Item Request link on the Maintain Items page.	Approve or deny a new item request. To add and approve a new item request, indicate the setID and item ID, and click the Create Item Notification button.

Maintaining Catalogs

This section provides an overview of item catalogs and discusses how to maintain catalogs.

Understanding Item Catalogs

Item catalogs control the items that are available to users when they are creating requisitions. Using the Maintain Catalog feature, you can:

• Define the catalog security implementation to use for PeopleSoft eProcurement requisitions.

• Define catalog types, such as item catalogs, templates, express forms, and direct connect suppliers.

• Set up catalog security types, including attributes and default information for the type.

• Grant different catalog type access for different security types.

Page Used to Maintain Catalogs

Page Name	Definition Name	Navigation	Usage
Maintain Catalogs	PV_ADM_CATALOGS	eProcurement, Administer Procurement, Maintain Catalogs	Maintain catalogs by adding security and catalog types. Access is limited to users with the SYSTEM_ADMIN action role.

See Also

Maintaining Catalogs

Access the Maintain Catalogs page (eProcurement, Administer Procurement, Maintain Catalogs).

Maintain Catalogs page

Use the links on this page to navigate to other pages where you can add security and catalog types to the Customer Relationship Management (CRM) application.

Setting Up Profiles

This section discusses how to:

- Manage personal templates for a profile.

- Copy a personal template for a profile.

- Manage favorites group for a profile.

- Copy a favorites group for a profile.

Pages Used to Set Up Profiles

Page Name	Definition Name	Navigation	Usage
My Profile	PV_ADM_MY_PROFILE	eProcurement, My Profile	Define information about users, including email addresses, passwords, alternate IDs, and preferred languages.
Manage Personal Templates	PV_REQ_TEMP_MGR	eProcurement, My Profile Click the Manage Personal Templates link.	Add item templates to the user, allow the templates to be shared with other roles and users, view the item details within each template, and copy templates that are created by other users.
Copy a Personal Template(s)	PV_REQ_TEMPL_COPY	eProcurement, My Profile Click the Manage Personal Templates link. Click the Copy a Personal Template link.	Copy personal templates for a profile.
Request Procurement Card	PV_CC_REQUEST	Click the Request Procurement Card link on the My Profile page.	Define user information for a procurement card. The information includes amount and transaction limits.
Manage Favorites Groups	PV_REQ_FAV_GRP	eProcurement, My Profile Click the Manage Favorites Groups link.	Add favorite groups to the user, allow the favorites groups to be shared with other roles and users, view the item details within each favorite group, and copy favorite groups that are created by other users.

Page Name	Definition Name	Navigation	Usage
Copy a Favorites Group	PV_REQ_GRP_COPY	eProcurement, My Profile Click the Manage Favorites Groups link. Click the Copy a Favorites Group link.	Copy favorites groups for a profile.

Managing Templates for a Profile

Access the Manage Personal Templates page (eProcurement, My Profile. Click the Manage Personal Templates link).

You create personal templates by using the Create Requisition - Add Items and Services - Favorites page.

See <u>Chapter 10, "Creat," Creating Requisitions, page 236.</u>

Allow Sharing	Select to indicate that this template can be copied by other roles and users. If not selected, the template cannot be copied.
Share Details	Click to access the Share Details page. Select Share with All Roles and Requesters to share this template, or select specific roles and requesters to specify only the individuals who can share the template.
View Details	Click to access the View Details page, which lists the items in the template. Items can be removed from this page, but they cannot be added.
Copy a Personal Template	Click to access the Copy a Personal Template page, which enables you to copy a template that is shared by other requesters.

Copying a Personal Template for a Profile

Access the Copy a Personal Template page (eProcurement, My Profile. Click the Manage Personal Templates link. Click the Copy a Personal Template link).

Source Template

Requester	Select a requester who has granted you access on the Share Details page for the template.
Template Name	Select a template that a requester has granted you access.

Target Template

Template Name	Enter a template that will be used for the profile. Press the Tab key after completing this field.
Description	Enter a description that will be used for the profile. This field appears after you tab out of the Template Name field.
Copy to Target Template	Click to copy the items that are selected from the Source Template section to the Target Template section.

Managing Favorite Groups for a Profile

Access the Manage Favorites Groups page (eProcurement, My Profile. Click the Manage Favorites Groups link).

You create favorites groups by using the Create Requisition - Add Items and Services - Favorites page.

See <u>Chapter 10, "Creat," Selecting Favorite Items and Item Groups to Include in Requisitions, page 246.</u>

See <u>Chapter 10, "Creat," Finding Requisition Items, page 241.</u>

Allow Sharing	Select to indicate that this favorites group can be copied by other roles and users. If this option is not selected, the favorites group cannot be copied.
Share Details	Click to access the Share Details page. Select Share with All Roles and Requesters to share this favorites group, or select specific roles and requesters to specify only the individuals who can share the favorites group.
View Details	Click to access the View Details page, which lists the items in the group. Items can be removed from this page, but they cannot be added.
Copy a Favorites Group	Click to access the Copy a Favorites Group page, which enables you to copy favorites groups that are shared by other requesters.

Copying a Favorites Group for a Profile

Access the Copy a Favorites Group page (eProcurement, My Profile. Click the Manage Favorites Groups link. Click the Copy a Favorites Group link).

Source Favorites Group

Requester	Select a requester who has granted you access on the Share Details page for the Favorites Group.
Group Name	Select a favorites group that a requester has granted you access.

Target Favorites Group

Group Name	Enter a name that will be used for the profile. Press the Tab key after completing this field.
Description	Enter a description that will be used for the profile. This field appears after you tab out of the Group Name field.
Copy to Target Group	Click to copy the items that are selected from the Source Favorites Group section to the Target Favorites Group section.

Setting Up and Maintaining Users

To set up and maintain users, use the Procurement component (PV_OPR_DEFAULT).

This section discusses how to define user preferences in PeopleSoft eProcurement.

Pages Used to Set Up and Maintain Users in PeopleSoft eProcurement

Page Name	*Definition Name*	*Navigation*	*Usage*
Maintain Procurement Users	PV_ADM_PROCU_USERS	eProcurement, Administer Procurement, Maintain Procurement Users	Use this page to set up and maintain users in PeopleSoft eProcurement (buyers, employee profiles, requesters, and user preferences). Access is limited to users with the SYSTEM_ADMIN action role.
Procurement	OPR_DEF_TABLE_PM1	Click the User Preferences link on the Maintain Procurement Users page. Then click the Procurement link.	Define user preferences for PeopleSoft eProcurement.

Defining User Preferences for PeopleSoft eProcurement

Access the Procurement page (eProcurement, Administer Procurement, Maintain Procurement Users. Click the User Preferences link on the Maintain Procurement Users page. Click the Procurement link).

Procurement page

Use this page to enter the user preferences for the user's location, origin, department, and ship to location. You can also enter the requester and buyer that is most often associated with the user.

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Defining User Preferences"

Chapter 5

Importing and Searching Supplier Catalogs

This chapter provides an overview of supplier data and discusses how to:

- Load catalogs into PeopleSoft eProcurement.

- Define item catalogs.

- Set up catalog security.

- Set up searches by item attributes.

- Set up and use the express catalog.

Understanding Supplier Data

Supplier data includes the catalogs and items that you load into the PeopleSoft eProcurement system for use in creating requisitions and purchase orders. A catalog management system manages the supplier data by importing it from multiple suppliers or trading partners. This chapter discusses the PeopleSoft eProcurement components that make it possible to import, load, search, and secure item catalogs that you use in purchasing activities.

You set up these components using the Administer Procurement Main page. You also work with supplier data using the Direct Connect Supplier feature.

See Also

Chapter 8, "Integrating with a Marketplace," page 155

Chapter 9, "Integrating with Direct Connect Suppliers," page 203

Loading Catalogs into PeopleSoft eProcurement

This section provides an overview of PeopleSoft eProcurement catalogs and discusses how to:

- Import procurement catalogs.

- Enter item defaults.

- Validate and process imported items.

Understanding PeopleSoft eProcurement Catalogs

With this integration, you can move item catalogs and category hierarchies to PeopleSoft eProcurement. These items can then be entered on eProcurement requisitions and purchase orders. After you load the items, you should schedule regular updates to capture changes such as price changes, discontinuation of items, or the addition of new items.

Take these details into consideration before integrating with a catalog management system:

- The catalog setID maps to the item setID.

    Therefore, the setID for the catalog must be the same as the setID for the Item Master table.

- All hierarchies can be moved to eProcurement independent of the items.

    This enables you to update attributes for categories before loading the items.

- During the load, the system creates a tree if it doesn't already exist.

- During the load, you have the option of creating the hierarchy ID as a node or to not have the hierarchy ID as a node in the tree selected.

- The only restriction with hierarchies is that the category can only exist once in the hierarchy.

    If two are found when loading hierarchies to eProcurement, the node only shows up once.

- When loading the tree, the categories are created.

- Trading partners that are not associated with a vendor must be set up using the Link Suppliers page.

- When using PeopleSoft Catalog Management to do mappings, do not assign a value to the Item ID field.

    This enables Catalog Management to assign an ID that is automatically generated.

- When loading the items, you have an option in the Import Item Catalogs page to run all the processes.

    To do this, you have to specify the account and currency code. If not, access the Validate Items page to specify the account and continue with the load process.

Pages Used to Load Catalogs into PeopleSoft eProcurement

Page Name	Definition Name	Navigation	Usage
Procurement Catalog Load	PV_CP_IMPORT_RUN	eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File	Import procurement catalogs.

Page Name	Definition Name	Navigation	Usage
Items Defaults	PV_CP_RUN_DEFAULTS	eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File, Item Defaults	Enter items defaults.
Validate and Process Imported Items	PV_CP_PROCESS	Click the Process Imported Items link on the Procurement Catalog Load page.	Validate and process imported items.
Item Vendor page	ITM_VENDOR	Items, Define Items and Attributes, Purchasing Attributes

Select the Item Vendor tab. | View and edit item vendor requirements. |
| Linked Supplier | PV_MS_SEC_SUPPLIER | eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Supplier | Create a relationship between the vendor ID and the partner ID. |

Loading Catalog Management Catalogs into PeopleSoft eProcurement

PeopleSoft Catalog Management is used to aggregate several supplier catalogs for a requester to browse.

1. Create trading partner IDs.

2. Create an enterprise catalog.

3. Associate partner to the enterprise catalog.

4. Link the trading partner ID to vendors using the Linked Supplier page.

5. Import the supplier catalog using the Procurement Catalog Load page.

Importing Procurement Catalogs

Access the Procurement Catalog Load page (eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File, Procurement Catalog Load).

Procurement Catalog Load page

Note. The source that you select determines which import data fields and options are required for this page. A variety of different fields appear on the page based on the selection.

Source	Select the Catalog source.
	The system includes all attributes available for the Catalog integration.
	Sources include:

- *CUP File (Access Database).*

  See Chapter 8, "Integrating with a Marketplace," Loading Marketplace Catalog Items into PeopleSoft eProcurement, page 169.

- *Catalog Management.*

- *Express Catalog.* Use this source to load express items into the master item tables.

  Note. Express Catalogs will only appear in the list if you have express catalogs turned on at the eProcurement Installation Options page.

  See Chapter 5, "Importing and Searching Supplier Catalogs," Setting Up and Using the Express Catalog, page 133.

- *Item PriceList.*

- *xCBL 3.0XML File.*

Note. Express Catalogs can only be created from a CUP file using the source of *CUP File (Access Database)* or *xCBL 3.0XML File.* Express items cannot be created using the sources of *Catalog Management, Item PriceList,* or *Express Catalog.*

Item SetID	Map to the setID for the catalog that you are importing.
	If you are loading items, select the item setID and vendor setID for the catalog.
Vendor SetID	Limits the import to certain vendors, based on their setID.
Vendor ID	Limits the import to certain vendors, based on their ID.
Vendor Loc	Limits the import to a specific vendor location.
Catalog ID	Select a catalog upon which to base the import.
Hierarchy ID	Select a hierarchy upon which to base the import associated with the enterprise catalog.
Product File, Attachment File, and **Price File**	If you select the value of *CUP File (Access Database)* for the Source field on this page, then use these fields to enter the directory path and file name of the product, attachment, and price files. These flat files are created by the PeopleSoft eProcurement Export CUP Data process (PS_CUP_EXPORT.EXE).

Run Item Load   Enables you to run all load processes required to create the items. This option is only available when the Import Categories Only check box is not selected. If you don't select this option, click the Process Imported Items link to validate the items.

Import Categories Only   If you select the value of *Catalog Management* for the Source field on this page, then you can use this check box to select only the categories associated with the hierarchy ID. This creates the categories and populates the tree specified.

                                Note. If you are only importing categories, the system makes the vendor setID and the vendor ID unavailable.

Purchasing Dflts From Category   If you select the value of *Item PriceList.* for the Source field on this page, then you can select this check box to use the item category defaults that you established in the Item Categories (CATEGORY_TBL) component when creating the Purchasing Item Attributes segment of the item.

Index Items   Select to incorporate Verity indexing when you import the catalog items.

Process by date/time   If you select the value of *Catalog Management* for the Source field on this page, then you can use this check box to load items incrementally. Therefore, if the items have been previously imported, the next import only includes those items that have changed in PeopleSoft Catalog Management.

Delete Loaded Items   If you select the value of *Item PriceList.* for the Source field on this page, then you can select this check box to delete item records from the item price list staging tables as they are copied to the item loader staging tables. This enables you to work with smaller batches of item information by running the process several times against the same item price list load staging tables until all records in the tables have been processed. To keep the data in the staging tables for audit purposes, do not select this check box.

Add Hierarchy ID as Node   If you select the value of *Catalog Management* for the Source field on this page, then you can use this check box to create the hierarchy ID as a node. If you don't select this check box, the system disregards the hierarchy ID.

                                Note. If you do not have a hierarchy, the system does not load the items.

Tree Name   Select the tree that is to be populated with the categories. If the name specified does not exist, you will be asked if a tree should be created. If the answer is yes, the tree will be created; otherwise, the system asks you to select another tree name.

Auto Assign ID   If you select the value of *Catalog Management* for the Source field on this page, then you can use this field to select the method by which the process assigns item IDs: *For All New Items* or *When Item ID is not specified.*

Language   Select the language in which you want the catalog items to appear.

Catalog Destination	If you select the values of *CUP File (Access Database)* or *xCBL 3.0XML File* for the Source field on this page, then the Catalog Destination field enables you to choose to load the data in the item master table *(Master)* or in the express catalog *(Express).* This field is not available when using the values of *Catalog Management, Express Catalog,* or *Item PriceList* in the Source field.
Inactive Level	Select the level at which you want to inactivate an item. Values include:

- *Item Vendor*

- *Item Vendor Price*

Entering Item Defaults

Access the Item Defaults page (eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File, Item Defaults).

The Item Defaults page in the Procurement Catalog Load component

The Catalog Import process leverages the Price List Load and Item Loader processes. The Price List Load process assigns priority vendors if required, assigns an item ID if required, sets the effective date for pricing, and sets the audit actions correctly.

 The Item Loader process validates the data and inserts the data into the production Item Master table.

Last Update	Indicates the last time that the items were loaded.
Image Folder	Designate an image folder where images are kept.

Inventory Item	Select to designate that the system creates items as inventory items. By default, the system deselects the Inventory Item check box value.
Account	Enter a code for all categories created in order to run all future processes successfully.
Currency	Enter the currency code for all categories created in order to successfully run all future processes.

Validating and Processing Imported Items

Access the Validate and Process Imported Items page (eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File, Procurement Catalog Load. Click the Process Imported Items link on the Procurement Catalog Load page).

Use this page to review information about the marketplace supplier before you load their catalog items. You can also review new catalog categories and item statuses before you load them into a catalog.

Marketplace Supplier	Displays the supplier to which the corresponding row of data belongs. The supplier's name also appears.
Count	Displays the number of items the system loads or has loaded from this supplier.
Categories	Click to view the categories in which the imported items are to be placed.
View Items	Click to access the Imported Item Status page, where you can view statues for individual items.

Defining Item Catalogs

To define item catalogs, use the Tree Manager (PSTREEMGR) and Load Tree Data (PV_RUN_SRCH_UPDT) components.

This section provides an overview of defining item catalogs and discusses how to load tree data.

Understanding Defining Item Catalogs

To set up tree data, use the Load Tree Table component.

Item catalogs limit access to items in the PeopleSoft Item Master table, and are used by both the rule-based item catalog method and the business unit and requester level security.

To use item catalogs, you:

1. Define item catalogs using the PeopleSoft Tree Manager.

2. Group item categories by catalog ID.

3. Load tree data for item catalogs.

    This process is necessary for both the TSE and VSE search types.

Pages Used to Define Item Catalogs

Page Name	Definition Name	Navigation	Usage
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Define the item catalogs and assign items to each catalog.
Load Tree Data	PV_RUN_SRCH_UPDT	• eProcurement, Buyer Center, Maintain Items, Load Tree Data • eProcurement, Administer Procurement, Maintain Items, Load Tree Data • eProcurement, Administer Procurement, Run eProcurement Processes, Requisition Processes, Build eProcurement Verity Collections. Select the Update/Reload Tree Table check box	Load tree data. Run this process to combine tree data from multiple tree tables and load into the eProcurement tables. This enables better item search performance for both the TSE (tree table) and VSE (Verity search engine) search types.

Loading Tree Data

Access the Load Tree Data page (eProcurement, Buyer Center, Maintain Items, Load Tree Data).
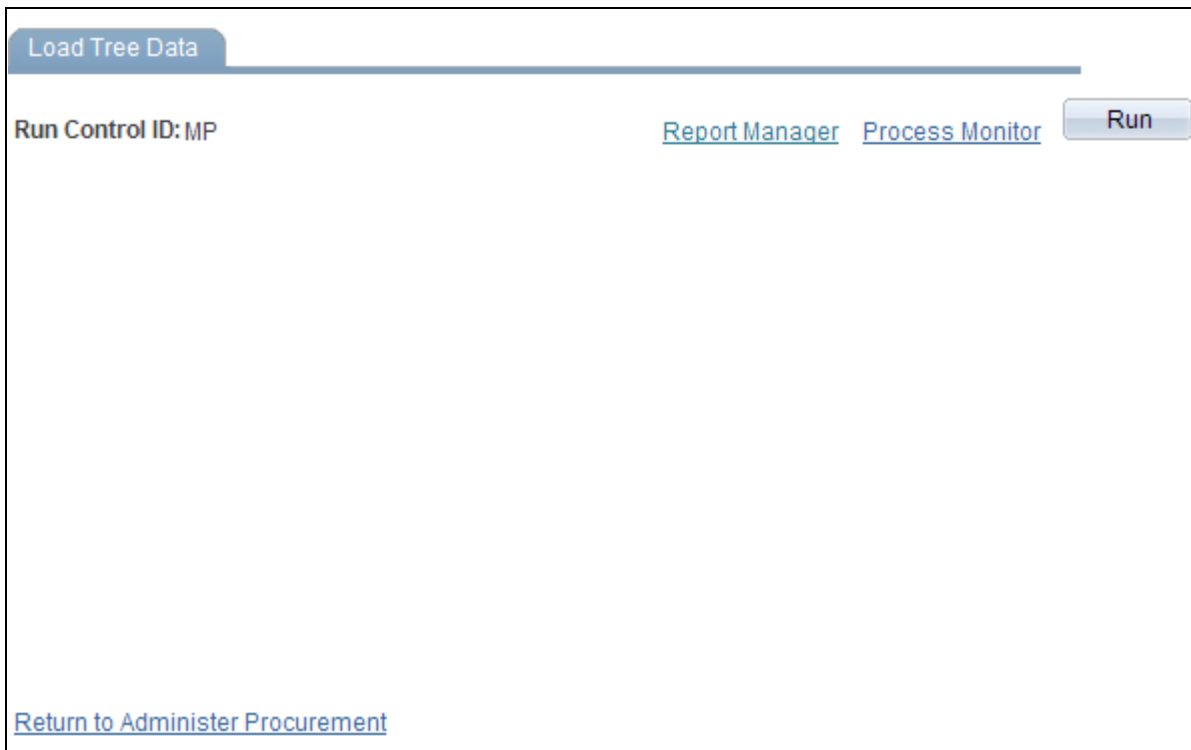
Load Tree Data page

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Tree Manager, "Using PeopleSoft Tree Manager"

Setting Up Catalog Security

To set up catalog security, use the eProcurement Catalog Security Option (PV_CAT_FACTORY), the Catalog Types (PV_CAT_SOURCE), and the Catalog Security Type (PV_CAT_SEC_TYPE) components.

This section provides an overview of catalog security and discusses how to:

• Define catalog security options.

• Define catalog types.

• Define catalog security types.

• Assign authorized item catalogs to security types.

• Define catalog security for business units.

Understanding Catalog Security

Catalog security makes it possible for you to control who uses a catalog. These techniques are available for controlling access to catalogs:

• Apply item security at business unit and requester levels.

• Apply item security using the rule-based catalog method.

Item Security at Business Unit and Requester Levels

 You can limit the items available to the Purchasing business unit, the requester, or both. This method only applies if the items are loaded into the Item Master table. In other words, express forms, direct connect suppliers, and company templates (purchasing kits) are not limited or part of the search and browse functionality of the Search Catalog page. With this method, you can use the *VSE* (Verity Search Engine) options.

The business unit level catalog security is maintained in the eProcurement Installation Options page and the Assign Catalog to Business Unit page. You enable the business-unit-level security by selecting the BU Catalog Control check box on the eProcurement Installation Options page. When this check box is selected, requesters can only access catalogs specifically assigned to the business unit used to enter the requisition.

Use the Assign Catalog to Business Unit page to define the available item catalogs for each Purchasing business unit. If this page is blank and BU catalog control is selected, then no items are available for requisition entry. The business unit level security applies only to eProcurement requisitions.

This requester level catalog security is maintained in the Requestor Setup page. Select the Use Only Assigned Catalogs check box and then enter the acceptable item catalog ID's in the Catalog Information section at the bottom of the page. When this check box is selected, the requester can only access catalogs specifically assigned to them. The available item catalogs would have to be defined individually for each requester to which security applied. The requester-level security applies to both PeopleSoft eProcurement and Purchasing requisitions.

In addition, if both the requester level and business unit level catalog security are used, only catalogs assigned to both levels can be accessed by the requesters.

Apply Item Security Using the Rule-Based Catalog Method

The rule-based item catalog method provides a framework to implement item catalog authorization. The architecture is flexible enough to allow for different implementations of item catalog security based on different requirements. This enables you to implement an organization-specific access policy, without the need to modify delivered code and objects. The rule-based item catalog method must use the Verity search engine.

The rule-based item catalog method uses different security levels (security types) to control item catalog access. The non rule-based method enables you to control security by the business unit level and the requester level; however, the rule-based method enables you to control security at any level that you choose. Just like the non rule-based method, the rule-based method restricts the user to the item catalogs that pass all the security restrictions.

In addition, the rule-based catalog method can extend item catalog security control to other item catalog sources such as company templates (purchasing kits), direct connect suppliers, and express forms.

There are two choices for applying the rule-based item catalog method:

- *Business Unit, User Role, and Requester Level:* PeopleSoft delivers a predefined example that you can implement into the organization.

  Much of this setup has already been defined for you; making implementation quicker and easier. This predefined method uses item catalog restrictions at the levels of business unit, user role, and individual requester. It also enables item searching and browsing on the Item Master table, express forms, direct connect suppliers, and company templates (purchasing kits). The addition of user role enables you to restrict requesters without defining each requester individually; this saves time and maintenance.

- *Rule-Based Item Catalog Method Defined for Unique Needs:* Using the rule-based item catalog method, you can design an item catalog security using any item sources and any restriction level.

  This method requires the most set up, but provides the tailored solution to an organization's specific needs.

To set up a rule-based item catalog method:

1. Use the eProcurement Catalog Security Option page to define system wide setting to create an eProcurement requisition.

   Do not enable the access policy and GUI class types until you have finished the set up.

2. Use the Catalog Types page to define the item catalog sources, such as, the Item Master table, express forms, direct connect suppliers, and company templates (purchasing kits).

3. Create catalog security types to identify the levels to apply item restriction, such as, by business unit, user role, or requester.

   The setup for the security types of business unit, requester, and user role are supplied by the Security Types Default page.

4. Use the Catalog Security page to define the authorized item catalogs for each of the security types.

   For the security type of BUSINESS_UNIT, you can use either the Catalog Security page or the Assign Catalog to Business Unit page under Maintain Items. For the security type of REQUESTOR_ID, you can use either the Catalog Security page or the Requestor Setup page.

5. Use the eProcurement Business Unit Actions page to identify the eProcurement actions, such as express forms (EXPRESSFORM_SECURITY), direct connect (DCSUPPLIER_SECURITY), and company templates (TEMPLATE_SECURITY), that should be used for each business unit.

6. Return to the eProcurement Catalog Security Option page and enable the access policy and GUI class types.

See Also

Pages Used to Set Up Catalog Security

Page Name	Definition Name	Navigation	Usage
eProcurement Installation Options	PV_INSTALLATION_PV	eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options	Define the catalog search type. To include business-unit level item catalog security, enter *Y* in the BU Catalog Control field.
eProcurement Catalog Security Option	PV_CAT_FACTORY	eProcurement, Administer Procurement, Maintain Catalogs, eProcurement Catalog Security Option	Define catalog security options. These are system wide access policies and GUI formats for the rule-based item catalog method.
Catalog Types	PV_CAT_SOURCE	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Types	Define catalog types.
Catalog Security Types	PV_CAT_SEC_TYPE	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types	Define catalog security types. These are levels at which you apply catalog security, for example, at the user role level or the individual requester level.
Security Type Attributes	PV_CAT_ST_ATTR	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types Click the Attributes tab.	Define security type attributes which include query or prompt tables used.
Catalog Security	PV_CAT_SECURITY	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types Click the Catalog Security link.	Assign authorized item catalogs to security types.
eProcurement Business Unit Actions	PV_ACTIONS_BU	eProcurement, Administer Procurement, Maintain Business Units, eProcurement Business Unit Actions, Assign Actions to Business Units	Define catalog security for business units. The applicable eProcurement actions enable security for items from the business template, express forms, and direct connect suppliers.

Defining Catalog Security Options

Access the eProcurement Catalog Security Option page (eProcurement, Administer Procurement, Maintain Catalogs, eProcurement Catalog Security Option).

eProcurement Catalog Security Options page

Use this page to define the access policy for the item catalogs and the GUI presentation for the Catalog Securities component. If you customize the access policy or GUI presentation, then insert a new row with a new implementation application class.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleCode Developer's Guide, "Creating Application Packages and Classes"*

| **Class Type** | Enter the interface classes to be used of access policy and GUI presentation. The system is delivered with the class types already defined. However, you can customize and add versions of these classes. The system delivered classes are: |

1. *AccessPolicy:* Defines the processing logic for item catalogs to be accessed by a user.

   When a requester is entering a requisition, the available items are limited based on this logic. This class type enables the system to retrieve only the items that are authorized by all applicable security types.

2. *GUI:* Defines the GUI presentation for the Catalog Security component (PV_CAT_SECURITY).

   It provides an interface, where you can create a customized page layout for the Catalog Security page by implementing an implementation application class.

3. *RegionalFilter:* Defines regional item and vendor security for item browsing and searching.

| **Root Package ID** | Select the package of the PeopleCode class that you created. |

Application Class Path   Enter an application class to further define the implementation (class types). You must enter implementation application classes for the class types of *AccessPolicy* and *GUI.* The system is delivered with two implementation application classes. You can override these with custom versions.

1. *IntersectPolicy* (for the AccessPolicy class type): Defines how item catalogs are to be accessed by a user.

   This application class limits a requester to viewing item catalogs that are included in all security types used. In other words, it is the intersection of item catalogs retrieved by all security types. If you decide that the environment requires a different approach to item retrieval, then you can define an implementation application class.

2. *CatalogSecurityGUI* (for GUI class type): Defines the layout of the pages in the Catalog Security component.

   If you want to have a different GUI presentation, create a new implementation application class.

3. *Catalogs:VendorRegionFilter:* Defines regional security by vendor locations.

Description   Enter a brief description of the purpose of the class type and implementation application class.

Enabled   Select to activate the class type and implementation application class combination for the row. Do not select this check box until you have completed the system setup for item catalog security.

Defining Catalog Types

Access the Catalog Types page (eProcurement, Administer Procurement, Maintain Catalogs, Catalog Types).

Catalog Types page

Use this page to identify the types of item sources that should be available for requisition entry or retrieved by the search and browse feature. Enter all catalog types for use across the organization; this page applies system wide. The catalog types enabled on this page appear in the Catalog Type field on the Catalog Security page.

Type   Enter the catalog type. Use one or more of these options:

- *C:* Items located in the PeopleSoft Item Master table. This can include items from the marketplace or the express catalog.

- *D:* Items from direct connect suppliers.

- *E:* Express forms.

- *T:* Company templates.

Record Name   Enter the record definition that contains all the values for the item source. The system is delivered with the record names for the Item Master table, direct connect suppliers, express forms, and business templates. You can change this record name if you are customizing this area.

Enabled   Select to authorize access to this item source on the Catalog Security page. The system automatically changes to *Y* (yes) for type *C* and to *N* (no) for all other catalog types.

Defining Catalog Security Types

Access the Catalog Security Types page (eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types).

Catalog Security Types page

Use this page to define the levels where security should be applied. For example, suppose that the items available should be restricted by the business unit used to enter the requisition, then activate the row for business unit on this page. You can have multiple security levels defined.

The system is delivered with three security types, business unit, requester ID, and role name. You can add additional security types, for example, ship to location, by inserting a new row on this page. When a user enters a requisition, the list of authorized item catalogs is the intersection of the catalogs granted to each of the security types.

Security Type	Enter a descriptive name for the security type. The system is delivered with *BUSINESS_UNIT, REQUESTOR_ID,* and *ROLENAME.*
Root Package ID	Enter the parent application package.
Application Class Path	Enter an interface class that contains the processing logic for the security type. The system is delivered with *BusinesUnitSecurityType, RequestorSecurityType,* and *QuerySecurityType.* The implementation application classes for business unit and requester are specific to those security types and link them into the existing item catalog security system using the Assign Catalog to Business Unit page and the Requestor Setup page. However, the *QuerySecurityType* is not specific to the user role name and can be used with any additional security types that you may add to this page. For example, suppose that you decide to add a ship to location as a security type, then you can use the *QuerySecurityType* class for both role name and ship to.
Description	Enter a description of the security type.

Active   Select to enable this security type for the setID. If you select this for the security
                                  type of *BUSINESS_UNIT,* then the system:

1. Selects the BU Catalog Control check box on the eProcurement Installation
   Options page and makes it unavailable for selection.

2. Looks to the Assign Catalog to Business Unit page, as well as the Catalog
   Security page, to determine the authorized item catalogs.

   If you activate the security type *REQUESTOR_ID,* then the system:

1. Looks to the Requestor Setup page, as well as the Catalog Security page, to
   determine the authorized item catalogs.

2. Does not use the Default Access field on the Security Type Attributes page.

Catalog Security   Click to access the Category Security page, where you can update security
                                 parameters.

Defining Security Type Attributes

Access the Security Type Attributes page (eProcurement, Administer Procurement, Maintain Catalogs,
Catalog Security Types. Click the Attributes tab).

Security Type	Default Access	Query Name	Prompt Table	SetID Control
BUSINESS_UNIT	Y		SP_BU_PM_NONVW	☐
REQUESTOR_ID	Y		RQSTR_ACTIVE_VW	☐
ROLENAME	Y	PV_CAT_ROLENAME_QI	PV_CAT_ROLE_VW	☐

Security Type Attributes page

Use this page to define the attributes for each of the security levels that you defined on the Security Types
page.

Default Access	Determines access to catalogs when no data entry found for the security type in Catalog Security page. Enter *Y* to access all item catalogs and enter *N* for no access to item catalogs. For example, for the security type of business unit, if you do not enter the business unit *AUS01* on the Catalog Security page, then a default access value of *Y* gives *AUS01* access to all item catalogs; However, a default access value of *N* gives *AUS01* no access to any item catalogs. Since the system uses an intersect policy, *N* would prevent any entries into the business unit *AUS01*.

Note. The Default Access field is not applicable to the security type of *REQUESTOR_ID,* because the system always loads all requesters into the Catalog Security page.

Query Name	Enter a query record name to retrieve the acceptable values based on the security type record definitions. A query is required if the implementation application class on the Catalog Security Types page is the QuerySecurityType class. Design this query to retrieve the needed data to find rows. All necessary values can be retrieved based on the requisition's business unit, requester, or user ID. For example, if the ship to location is defined as a security type, then the query would be designed to retrieve the ship to based on the user ID on the User Preferences - Procurement page.
Prompt Table	Enter the prompt table to be used for this security type. A prompt table is required if the implementation application class is the system-delivered *QuerySecurityType.*
SetID Control	Select whether the security type query in the Query Name field is setID controlled.

Assigning Authorized Item Catalogs to Security Types

Access the Catalog Security page (eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types. Click the Catalog Security link).

Catalog Security page (1 of 2)

Catalog Security page (2 of 2)

For each security type (security level), define what item catalogs are available.

Find	Enter a value on which to search in the scroll area. Use this field when you have a large number of values in the scroll area.
Value	Select a field value that you have defined for this security type.
Active	Select to enable the item catalogs security for this value. If this value is not selected, then the Default Access field on the Security Type Attributes page is applied.
Authorized Catalogs	Click the Show Authorized Catalogs button to display or enter the set of item catalogs authorized for the value. This includes all item catalogs, no catalogs, or a specific set of catalogs. To add item catalogs, select the catalog type and click the Select Catalogs link to display all valid catalogs, then select the catalog and click the OK button. The new catalog appears in the Authorized Catalogs section.

Add   Select to add a new row to this page, so that you can enter a new value.

Update All Business Units

Use this section to add or remove item catalogs to all of the listed values. For example, if a new item catalog is created after implementation, use this feature to add the catalog to all business units, requesters, and user roles. To add or remove item catalogs, select the catalog type, use the Select Catalogs link to display all valid catalogs, then select the catalogs and click the Add To All or Remove From All button.

Defining Catalog Security for Business Units

Access the eProcurement Business Unit Actions page (eProcurement, Administer Procurement, Maintain Business Units, eProcurement Business Unit Actions, Assign Actions to Business Units).

eProcurement Business Unit Actions page

If you have set up the system to control access to direct connect, express forms, or company templates, then you must identify specific business units that utilize the catalog security. For each action, you need to identify business units you wish to apply catalog security to:

Action Name   Options are:

- *DCSUPPLIER_SECURITY*: Enable item security for items from direct connect suppliers

- *EXPRESSFORM_SECURITY*: Enable item security to be applied to express forms.

- *TEMPLATE_SECURITY*: Enable item security to be applied to business templates.

Note. Item security is always enabled for the items within the PeopleSoft Item Master table.

Setting Up Searches by Item Attributes

This section provides an overview of searching by item attributes and discusses how to:

- Import attributes from a flat file.

- Verify imported attributes.

- Assign cross-references to attribute names.

- Define regional-based sourcing.

PeopleSoft eProcurement enables you to associate attributes with categories to make item searches more precise. After item attribute searches are implemented, you can select one or more categories on the Advanced Search page and search on the attributes for the selected categories, including their children.

Understanding Item Searches

This section discusses:

- Search implementation steps.

- Attributes and categories tables.

- Import, stage, and load attribute process flow.

- Attribute names and unit of measure (UOM) variations.

Search Implementation Steps

Search implementation involves these steps:

1. Import attributes to the staging table.

2. Verify the imported attributes.

3. Designate cross-references for attribute names and units of measure.

4. Load attributes from staging.

5. Maintain marketplace category attributes and item attributes.

Attribute and Category Tables

The category attributes for item attribute searches are stored in table PV_CAT_ATTR_TBL, which includes these fields:

Field	Field Type
SETID	(key field)
CATEGORY_TYPE	(key field)
CATEGORY_CD	(key field)
CATEGORY_ID	(key field)
ATTRNAME	(key field)
LANGUAGE_CD	(key field)
DESCR	(character)
UOM_ATTR	(Assuming that ISO standard UOM is used.) **Note.** You might need to add units of measure to the system or convert units of measure.
FLAG	(numeric flag)

This table represents an example of category attributes using the fields defined above for the table PV_CAT_ATTR_TBL:

Example of category attributes in the PV_CAT_ATTR_TBL record.

Item attributes for the item attribute search are stored in the PV_ITM_ATTR_TBL table, which includes:

Field	Field Type
SETID	(key field
INV_ITEM_ID	(key field
ATTRNAME	(key field
ATTVALUE	(character field)
UOM_ATTR	UOM attributes
PV_ATTRVALUE	numeric field

This table represents an example of item attributes using the fields defined above for the table PV_ITM_ATTR_TBL:

SetID	INV_ITEM	ATTR_NAME	ATTR_VALUE	PV_ATTR_VALUE	UOM_ATTR
SHARE	1	Weight	10	10	LBS
SHARE	1	Size	Med	0	
SHARE	1	Height	2	2	IN
SHARE	2	Weight	50	50	LBS
SHARE	2	Color	Blue	0	
SHARE	2	Size	Large	0	
SHARE	3	Speed	233	233	MHZ
SHARE	3	Memory	4	4	GB
SHARE	3	Modem	56	56	KPS
SHARE	4	Memory	400	400	MB

Example of item attributes in the PV_ITM_ATTR_TBL record.

Import, Stage, and Load Attribute Process Flow

This diagram demonstrates the flow for setting up for item attribute searches from loading item attributes from PeopleSoft Catalog Management, a CSV file, or a CUP file into the eProcurement item attributes and catalog attributes tables.:
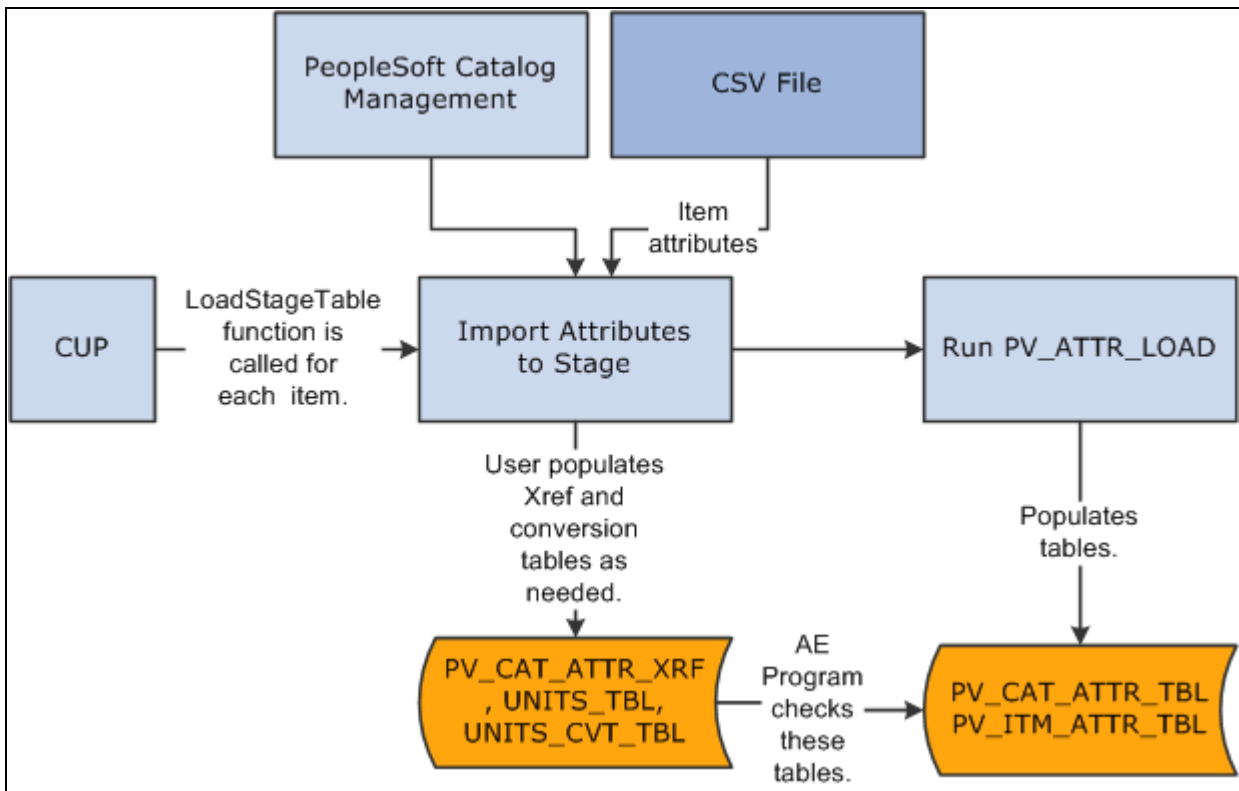
Item attribute search process flow from upload source to populating eProcurement tables

Attribute Names and UOM Variations

You might have variations in the units of measure:

• If the item load creates redundant attribute names for a category, designate cross-references for the attribute names.

   For example, you might have a category called office supplies with items that use both *WGT* and *WEIGHT* as attribute names for weight.

• If the item load creates redundant UOM names for an attribute in a category, cross-reference the UOM names.

PeopleSoft eProcurement provides table PV_CAT_ATTR_XRF for cross-referencing attribute names and units of measure. It contains these fields:

Field	*Field Type*
SETID	(key field)
CATEGORY_TYPE	(key field)
CATEGORY_ID	(key field)

Field	Field Type
CATEGORY_CD	(key field)
ATTRNAME	(key field; original attribute name or attribute UOM)
PV_ATTRNAME	(convert to new attribute name or attribute UOM)
UNIT_OF_MEASURE	(base UOM)

Use the Attribute Name Cross-Reference page to create cross-references for attribute and UOM names.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Tree Manager, "Introduction to PeopleSoft Tree Manager"

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Cube Manager, "Designing Cubes"

Pages Used to Set Up Searches by Item Attributes

Page Name	Definition Name	Navigation	Usage
Attribute Name Cross Reference	PV_CAT_ATTR_XRF	eProcurement, Administer Procurement, Maintain Supplier Integration, Attribute Name Cross Reference	Assign cross-references to attribute names and assign base UOMs for attributes. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.
Attributes Staging Table	PV_ATTR_LOAD_STG	eProcurement, Administer Procurement, Maintain Supplier Integration, Attributes Staging Table	Verify imported attributes. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.

Page Name	Definition Name	Navigation	Usage
Category Attributes	PV_SRCH_CAT_ATTR	eProcurement, Administer Procurement, Maintain Supplier Integration, Category Attributes	Edit category attributes that have been imported from a marketplace. Access is limited to users with the eProcurement action role SYSTEM_ADMIN. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Defining Purchasing Item Attributes.
eProcurement Business Unit Options	PV_BUS_UNIT_PM	eProcurement, Administer Procurement, Maintain Business Units, eProcurement Business Unit Options	Enable regional security for the eProcurement business unit.
Import Attributes	PV_ATTR_IMPORT	eProcurement, Administer Procurement, Maintain Supplier Integration, Import Attributes	Import attributes from a flat file. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.
Item Attributes	PV_SRCH_ITM_ATTR	eProcurement, Administer Procurement, Maintain Supplier Integration, Item Attributes	Verify and edit item attributes imported from a marketplace. Access is limited to users with the eProcurement action role SYSTEM_ADMIN. See *PeopleSoft Enterprise Managing Items 9.1 PeopleBook*, "Defining Items by SetID," Defining Items at the SetID Level.
Item Vendor by Region	ITM_REGION_VNDR	eProcurement, Administer Procurement, Maintain Catalogs, Item Vendor by Region	Define regional-based sourcing for items.
Load Attributes from Stage	PV_ATTR_RUN_LOAD	eProcurement, Administer Procurement, Maintain Supplier Integration, Load Attributes	Import attributes from the attributes staging table page into the category and item attributes tables. Access is limited to users with the eProcurement action role SYSTEM_ADMIN.

Page Name	Definition Name	Navigation	Usage
Purchasing Attributes	ITM_TBL_PUR	eProcurement, Administer Procurement, Maintain Catalogs, Purchasing Attributes	Define item information specific to purchasing. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook* , "Defining Purchasing Item Information," Defining Purchasing Item Attributes.
Units of Measure	UNITS_OF_MEASURE	Set Up Financials/Supply Chain, Common Definitions, Units of Measure, Units of Measure	Confirm this table includes the UOMs used by the items that you are loading.

Importing Attributes from a Flat File

Access the Import Attributes page (eProcurement, Administer Procurement, Maintain Supplier Integration, Import Attributes).

Import Attributes page

Use this page to stage attributes to eProcurement from a flat file as the first step in integrating the attributes into searches. The most typical data load consists of marketplace items, but you can import attributes from any properly formatted text file.

SetID   Select a setID from the available options. If the flat file has no setID, select *SHARE.*

File Type   Select *Comma Delimited* for text files.

File Directory   Enter the directory where the flat file is located.

                                    Note. The fields included in this directory are listed following these field
                                    descriptions.

Import Attributes   Click to import the flat file to PeopleSoft eProcurement.

Attributes Staging Table Click to access the Attributes Staging Table page, where you can verify the
                                    attributes that you have imported.

File Directory Fields

These fields are in the File Layout PV_ATTR_LOAD _COMMA. Fields that are marked with an asterisk (*)
are required:

*SETID

*INV_ITEM_ID

*ATTRNAME

*LANGUAGE_CD

PV_CV_SPN

PV_CV_PART_EXT

*MFG ID

*MFG ITEM ID

CATEGORY_TYPE

CATEGORY_CD

CATEGORY_ID

*DESCR

*ATTRVALUE

UOM_ATTR

These rules apply to the previous fields:

- SETID is required only if you have not selected a setID on this page.

- INV_ITEM_ID or MFG_ID and MFG_ITEM_ID is required unless you include values for PV_CV_SPN
  and PV_CV_PART_EXT.

- These fields are comma-delimited with no additional spaces (empty fields must also be delimited).

- For multi-languages, the only field that should be translated is Attribute Description, DESCR.

  The Attribute Name field, ATTRNAME, must be the same across all languages for the same attribute.

Example

SHARE,10012,WEIGHT,ENG,,,BIKE-01,BIKE-ITM-12,,,,Weight,10,LBS

SHARE,10013,LEN,ENG,,,BIKE-01,BIKE-ITM-13,,,,Length,5,IN

SHARE,10014,WGT,ENG,,,BIKE-01,BIKE-ITM-14,,,,Weight,12,KG

SHARE,10014,WIDTH,ENG,,,BIKE-01,BIKE-ITM-14,,,,Width,6,IN

SHARE,10015,LEN,ENG,,,BIKE-01,BIKE-ITM-15,,,,Length,10,FT

SHARE,10015,COLOR,ENG,,,BIKE-01,BIKE-ITM-15,,,,Color,RED,

SHARE,10015,WEIGHT,ENG,,,BIKE-01,BIKE-ITM-15,,,,Weight,5,OZT

Verifying Imported Attributes

Access the Attributes Staging Table page (eProcurement, Administer Procurement, Maintain Supplier Integration, Attributes Staging Table).

Attributes Staging Table page: Item Attributes tab

Use the page to view or edit item attributes loaded into the PV_CAT_ATTR_TBL and PV_CAT_ATTR_XRF tables. The system populates the fields on this page with the imported values loaded from the Import Attributes page.

There is no need to edit the imported values on this page unless you are required to cross-reference attributes or UOM names. For large amounts of data, use the Attribute Name Cross Reference page or manually convert the UOMs.

When cross-referencing names or converting units of measure, you may receive a warning message advising that multiple UOMs have been imported for one category. Resolve the conflict by designating a base UOM on the Attribute Name Cross Reference page.

If you are importing UOMs that do not already exist in the system, you receive a warning message. To add new units of measure, use the Units of Measure page.

Manufacturing and Category Tab

Select the Mfg and Category (manufacturing and category) tab.

Manufacturing ID	Displays the manufacturer of this item. This information comes from the Item Definitions - General page.
Manufacturer's Item ID	Select an identifier for this manufacturer's item.
Category Type, Category, and **Category ID**	Displays information about the category to which the item belongs.
Numeric	Select to capture item attributes with generic numeric and alphanumeric item attribute fields at both the setID and business unit level.

Status Tab

Select the Status tab.

Processed	Values are:
	N: Attribute is not loaded. The data is still in the staging table.
	Y: Attribute is loaded. The data has been loaded from the staging table to the category and item attributes tables.
	E: Error attribute cannot be loaded or has been loaded with assumptions about the UOM.
	Note. Attributes are loaded on the Load Attributes from Stage page.
Error Message	If one of these messages appears, you can use the Units of Measure page to add UOMs or create conversions for UOMs:
	UOM Conversion Rate Not Defined. 1 to 1 Conversion Assumed.
	Invalid Unit of Measure. Attribute Not Loaded.

Assigning Cross-References to Attribute Names

Access the Attribute Name Cross Reference page (eProcurement, Administer Procurement, Maintain Supplier Integration, Attribute Name Cross Reference).

Attribute Name Cross Reference page

If you have redundant attribute or UOMs, establish cross-references so that the system can refer to one standard name. Cross-references enable you to establish one name for each attribute and one name for each UOM within a category.

Attribute	Select an attribute for which you want to create a cross reference.
New Attribute Name	Select an attribute name for cross-referencing the selection in the Attribute Name field. If you are creating a UOM cross-reference, leave this field blank.
Base UOM	Select a base UOM for the new attribute name. The name must exist in the UOM table and there must be a conversion for the UOM. You can create a conversion on the Units of Measure page.

Note. For each category that you use, only one UOM is allowed for each attribute. For example, for the attribute *Length,* you cannot use both inches and feet as the unit; however, you can use inches in one category and feet in another.

Defining Regional-Based Sourcing

Access the Item Vendor by Region page (eProcurement, Administer Procurement, Maintain Catalogs, Item Vendor by Region).
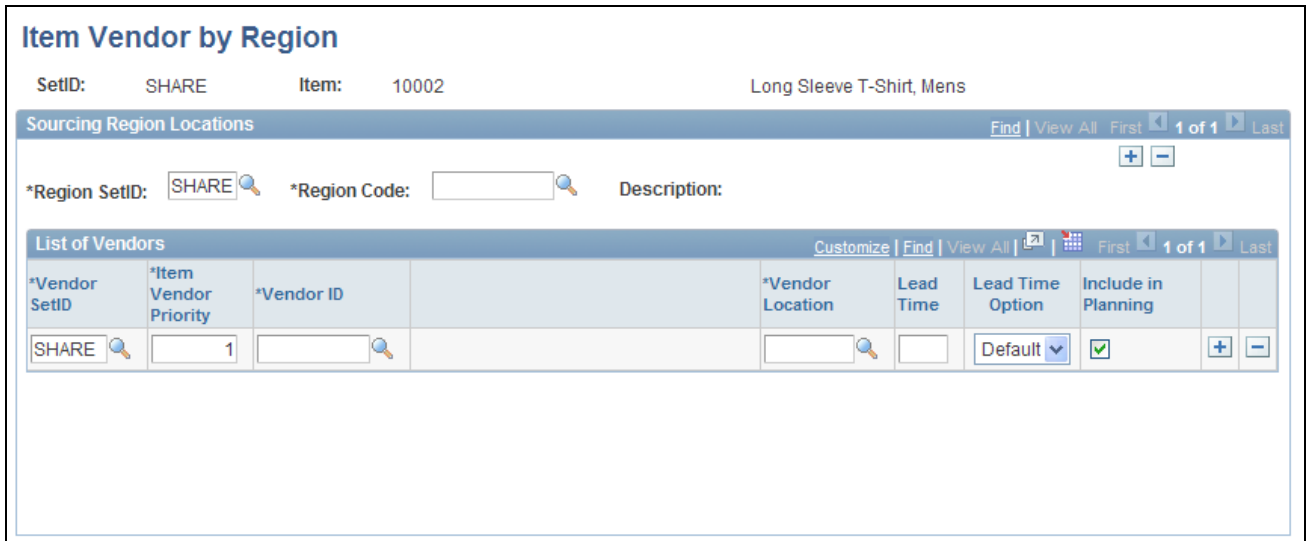
Item Vendor by Region page

Use this page to set up regional sourcing for an item and define priority vendors by item regions. This enables regional item and vendor security for item browsing and searching. When an item has a vendor-region relationship, the system applies security to filter out vendors and vendor locations that do not belong to the same region as the ship to region.

To define regional-based sourcing:

1. Use the eProcurement Installation Options page to enable the Verity search engine.

    Select *VSE* as the Catalog Search Type. To access the page, select eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options.

2. Use the eProcurement Role Actions page to enable the VIEW_ALL_VENDORS action. To access the page, select eProcurement, Administer Procurement, Maintain System Users and Roles, eProcurement Role Action.

3. Use the eProcurement Catalog Security Option page to enable catalog security.

    Select the Enabled check box for the following Class Types: AccessPolicy, GUI, and Region Filter. To access the page, select eProcurement, Administer Procurement, Maintain Catalogs, eProcurement Catalog Security Option.

4. Use the eProcurement Business Unit Options page to enable regional security.

    Select the Enable Req Region Security check box to activate sourcing security. To access the page, select eProcurement, Administer Procurement, Maintain Catalogs, eProcurement Business Unit Options.

5. Use the Purchasing Attributes page to define item information specific to purchasing such as the preferred vendor.

    To access the page, select eProcurement, Administer Procurement, Maintain Catalogs, Purchasing Attributes.

6. Use the Purchasing Controls page to verify that the Available in All Regions option is not selected.

    To access the page, select eProcurement, Administer Procurement, Maintain Catalogs, Purchasing Attributes. Select the Purchasing Controls tab.

7. Use the Item Vendor by Region page to establish the relationship between the item, region, and vendor.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing," Sourcing by Region

Setting Up and Using the Express Catalog

This section provides an overview of express catalogs and discusses the pages used to set up and utilize express catalogs.

Understanding the Set Up and Use of Express Catalogs

The express catalog enables you to index items that were loaded from a marketplace into the PeopleSoft EOCM_GEN_TBL table. These express items are not added to the master item tables. This precludes the requirement of running the Item Load process, making it easier to configure PeopleSoft eProcurement. This is particularly valuable to customers who do not use PeopleSoft Inventory or rely on Purchasing item attributes. The express catalog uses the Verity search engine to manage items.

To set up the express catalog, an administrator:

•   Extracts data from the CUP file into eProcurement.

•   Sets up requesters to browse, search, and select items from the express catalog.

•   Uses express catalog items in rule-based security.

Express Catalog Load Processing

This diagram illustrates the flow for loading express catalog files:
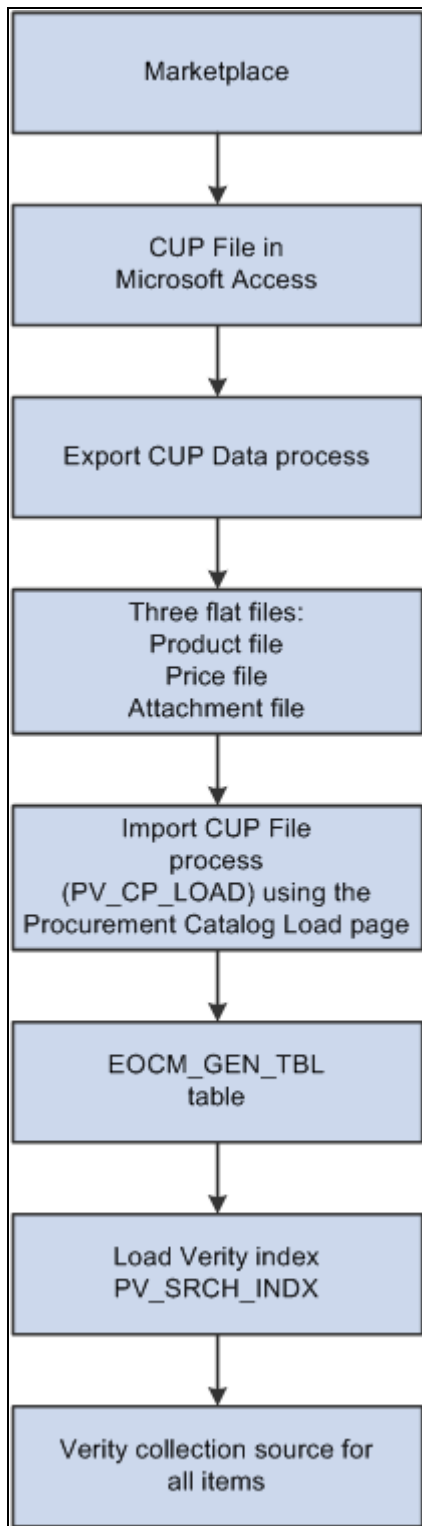
The process flow for loading express catalog items

To load items into an express catalog from a CUP (catalog update process) file, complete these steps:

1. Download the CUP file from the marketplace into a Microsoft Access database.

2. Use the Export CUP Data (PS_CUP_EXPORT) process to extract data from a CUP file and store this information in flat files. This process is a Microsoft Visual Basic program that retrieves data from a third-party Microsoft Access database and places it in a flat file so that the data can then be imported into the PeopleSoft tables. This program is outside of the PeopleSoft application and is delivered on the installation disc.

3. Import the flat files to PeopleSoft eProcurement, using the Import CUP File process (PV_CUP_LOAD). This process can be launched from the Procurement Catalog Load page. The item data is loaded into the EOCM_GEN_TBL table.

4. Use the Verity PV_SRCH_INDX record to initiate the creation or update of the index. To initiate this process, you can select the Index Items check box on the Procurement Catalog Load page or use the Update Daemon program. The process uses a date and time stamp to determine which rows to update in the Verity index. The Verity search index process is run only if express catalogs have been enabled on the eProcurement Installation Options page (INSTALLATION_PV).

See Also

Pages Used to Set Up and Use the Express Catalog

Page Name	Definition Name	Navigation	Usage
eProcurement Installation Options	PV_INSTALLATION_PV	eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options	Use the Item Source Option field to identify whether the system should use items from the item master tables, the express catalog, or both when browsing or searching for items using PeopleSoft eProcurement. See Chapter 3, "Determining Technical Implementation Options," Setting Up PeopleSoft eProcurement Installation Options, page 23.

Page Name	Definition Name	Navigation	Usage
eProcurement Business Unit Options	PV_BUS_UNIT_PM	eProcurement, Administer Procurement, Maintain Business Units, eProcurement Business Unit Options	Use the Item Source field to identify whether the system should use items from the item master tables, the express catalog, or both when browsing or searching for items within a business unit. **Note.** You will only be able to utilize express items if you selected either the *Express Items Only* or the *Master and Express Items* option from the eProcurement Installation Options page. See Chapter 4, "Determining Functional Implementation Options," Defining Business Unit Options for PeopleSoft eProcurement, page 73.
Procurement Catalog Load	PV_CP_IMPORT_RUN	eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File	Use the Source field to add *CUP File (Access Database)* or *xCBL 3.0XML File* as a load type and then select *Express* in the Catalog Destination field to load the data in the express catalog. Select the Index Items check box to also process the PV_SRCH_INDX record if you select the Run Item Load check box. **Note.** When importing catalog items with Index Items selected, a Verity collection must already exist. Otherwise the Procurement Catalog Load process will fail.

Chapter 6

Integrating with PeopleSoft HRMS

This chapter provides an overview of PeopleSoft eProcurement and PeopleSoft Human Resources Management System (HRMS) integration and discusses how to set up HRMS integration:

Understanding PeopleSoft eProcurement and HRMS Integration

PeopleSoft eProcurement enables you to use employee information that is stored in the PeopleSoft HRMS database to create requesters and automatically update PeopleSoft eProcurement, based on changes to the employee data. The integration is accomplished with PeopleSoft Integration Broker, which enables you to receive service operations sent by PeopleSoft HRMS. When changes are made to the record in HRMS, they are automatically received by eProcurement.

The service operations are delivered with a status of *Inactive.* You must activate each service operation before attempting to publish or subscribe. The service operations that are sent by PeopleSoft HRMS must be activated in that database, and the messages to which PeopleSoft eProcurement receives must be activated in the PeopleSoft FDM database.

The integration between PeopleSoft HRMS and PeopleSoft eProcurement enables you to preform these tasks:

*   Send new user data from HRMS to eProcurement.

*   Automatically create requesters if a user contains a role that is predefined in Supply Chain Management as having access to the component.

*   Automatically inactivate a requester when a user account is locked out.

When updating information between databases, PeopleSoft Integration Broker imposes these outbound and inbound rules:

*   Full Table Publish (outbound)

    This rule erases all data from the target table and replaces it with data from the source table.

*   Incremental Table Publish (outbound)

    This rule captures the addition, change, or deletion of data that is performed in the source database and either inserts a new row of data, or deletes, or updates the corresponding row of data in the target database.

Note. PeopleSoft eProcurement receives data changes from the PeopleSoft HRMS database. It does not send data to PeopleSoft HRMS (except for the USER_PROFILE service operation). Also, PeopleSoft eProcurement does not receive any full table user profile data changes. It only receives incremental data changes.

Setting Up HRMS Integration

This section discussed how to:

• Set up the human resource management service operations.

• Set up defaults for automatic creation of users and requesters.

Pages Used to Set Up HRMS Integration

Page Name	Definition Name	Navigation	Usage
Requester Integration Defaults	PV_HR8_DEFAULTS	eProcurement, Administer Procurement Click the Maintain System Users and Roles link on the Administer Procurement page. Click the Requester Integration Defaults link on the Maintain System Users and Roles page.	Enter user and requester defaults for utilization in requester integration processing.

Setting Up the Human Resource Management Service Operations

PeopleSoft delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM. To setup this service operation:

1. Define the requester role in eProcurement.

2. Setup within PeopleSoft Integration Broker and Enterprise Components:

   Use the information in this table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.1 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
USER_PROFILE	Inbound Asynchronous	Update_User_Profile UserProfileAndRequester	No	HRMS
JOBCODE_SYNC	Inbound Asynchronous	JobcodeSync	No	HRMS

Service Operation	Direction and Type	Handlers	Chunking Available ?	Integrates With
JOBCODE_FULLSYNC	Inbound Asynchronous	JobcodeFullSync	No	HRMS
PERSON_BASIC_FULLSYNC	Inbound Asynchronous	PersonBasicFullSync	No	HRMS

Warning! The JOBCODE_FULLSYNC and the PERSON_BASIC_FULLSYNC should not be activated unless the organization is performing an initial implementation and no actual data exists in the PeopleSoft FSCM database.

If you change the status of these service operations to *Active,* the data in the PeopleSoft FSCM database will be overwritten. Do not activate the FULL_SYNC versions in PeopleSoft HRMS or PeopleSoft FSCM unless you intend to overwrite all the data in the target tables.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Setting Up Defaults for Automatic Creation of Users and Requesters

Access the Requester Integration Defaults page (eProcurement, Administer Procurement, Maintain System Users and Roles, Requester Integration Defaults).

Requester Integration Defaults page

For the purpose of integrating with HRMS, you only need to define the fields within the User Preferences and the Requester Defaults group boxes.

The user profile defaults are used to enable automatic creation of users who do not exist when using the requester integration.

Chapter 7

Integrating with the Oracle Supplier Network

This chapter provides an overview of the integration between PeopleSoft eProcurement and the Oracle Supplier Network and discusses how to:

* Set up the integration to the Oracle Supplier Network.

* Add requisition lines using the Exchange Oracle website.

* Send purchase orders and change orders to the Oracle Supplier Network.

* Receive purchase order acknowledgements from the Oracle Supplier Network.

* Receive advanced shipping notifications from the Oracle Supplier Network.

* Receive invoices from the Oracle Supplier Network.

Understanding the Integration Between PeopleSoft eProcurement and the Oracle Supplier Network

The Oracle eCommerce Market Place is composed of the Oracle Supplier Network (OSN) and the Exchange.oracle.com website.

Exchange.oracle.com is a website containing supplier-hosted item catalogs. Using punchout (synchronous transaction), PeopleSoft users can go from an eProcurement requisition to Exchange.oracle.com where they can search the item catalogs of one or multiple suppliers and then select items to be placed on their requisition. The requisition is eventually converted to a purchase order, which can be dispatched to the Oracle Supplier Network.

The Oracle Supplier Network (OSN) is an hosted service offering in which buyers and sellers use a common hub for exchanging and monitoring transactions. The integration between OSN and PeopleSoft enables you to pass the following transactions:

* Purchase orders and change orders from PeopleSoft to the OSN supplier (outbound transactions). The purchase order is passed to suppliers through OSN. Suppliers can decide their delivery method, and monitor transactions on OSN.

* Purchase order acknowledgement (POA) or a POA with changes from the OSN supplier to PeopleSoft (inbound transactions). The supplier's POA is sent through OSN to PeopleSoft.

- Advanced Shipping Notification (ASN) from the OSN supplier to PeopleSoft (inbound transaction). The supplier's ASN is sent through OSN and loaded into PeopleSoft as an advanced shipment receipt (ASR) where you can create a receipt in PeopleSoft.

- Invoices from the OSN supplier to PeopleSoft (inbound transaction). The supplier's invoice is sent through OSN and loaded into PeopleSoft where you can create a voucher in PeopleSoft Payables.

The following diagram illustrates the communication protocols between PeopleSoft, the Oracle Supplier Network, and the OSN suppliers. PeopleSoft should use OAG (Open Applications Group) XML for the outbound transaction since OSN supports incoming OAG messages over HTTP. The OSN suppliers can send and receive messages using cXML or OAG.
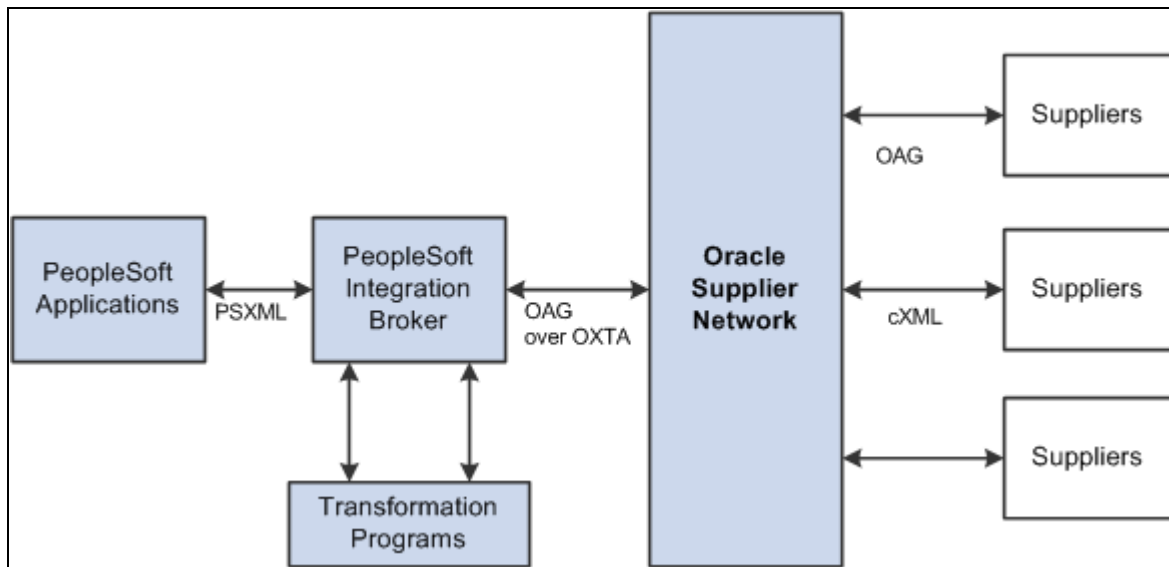
Overview of PeopleSoft to Oracle Supplier Network Integration

For outbound transactions from the PeopleSoft eProcurement or Purchasing applications, the PeopleSoft Integration Broker (Integration Gateway) uses application engine transformation programs and the fscm_epo_OSNListeningConnector IB connector to convert XML messages that use the PeopleSoft format (PSXML) into OAG XML files. For inbound transactions from the Oracle Supplier Network, OAG XML messages are sent to the PeopleSoft Integration Gateway where transformation programs and the fscm_epo_OSNListeningConnector IB connector convert the incoming files into the PSXML format.

Prerequisites

To set up the connection between eProcurement and the Oracle Supplier Network (OSN), you must register with OSN and invite your suppliers to register with OSN.

See *Oracle Supplier Network User Guide*

Common Elements Used in This Chapter

PSXML   An XML file that uses the PeopleSoft format.

OSN	The Oracle Supplier Network. OSN is a hosted service provided by Oracle OnDemand for handling transactions between Oracle systems and suppliers.
exchange.oracle.com	Supports supplier-hosted content enabling you to punchout from an eProcurement requisition to the exchange.oracle.com website. You can search across multiple supplier catalogs or one supplier catalog. Selected items can be placed on your eProcurement requisition.
OAG	Open Application Group. OSN supports incoming OAG messages over HTTP.
OXTA	Oracle XML Transport Agent. OXTA is a lightweight messaging platform for transmitting documents over HTTP and secure HTTPS.
UOS	Univeral Order Schema
cXML	Ariba's standard format for exchanging XML documents.
xCBL	Commerce One's standard format for exchanging XML documents.
HTTP	Hypertext Transfer Protocol. HTTP is a request/response protocol between clients and servers.

Setting Up the Integration to the Oracle Supplier Network

Complete the following tasks within PeopleSoft to enable the integration between PeopleSoft eProcurement and OSN or the Exchange.oracle.com website:

1. Review the Direct Connect Method page. The sample data contains the method, *EXCH_ORACLE* to setup the punchout to the Exchange.oracle.com website. Review this information and make any changes necessary for your environment.

2. Review the EDX PO Dispatch Types page. The sample data contains the EDX PO Dispatch Type of *OAG72* for dispatching purchase orders to the Oracle Supplier Network. Review this information and make any changes necessary for your environment.

3. Use the Linked Suppliers page to connect PeopleSoft vendors to OSN suppliers. For each vendor, you can define the EDX PO dispatch type OAG72 (for OSN suppliers) and define OSN information to enable the connection.

4. In the PeopleSoft Integration Broker, review and activate the service operations used to integrate PeopleSoft to OSN and Exchange.oracle.com..

5. Create a node to connect to the Oracle Supplier Network and the Exchange.oracle.com. The PeopleSoft system is delivered with the PSFT_EXCH_ORACLE node for the Exchange.oracle.com website and the PSFT_ORACLE_SUPPLIER_NETWORK node for the Oracle Supplier Network.

   See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Adding and Configuring Nodes"*

6. Activate a routing to be used with the node. The PeopleSoft system is delivered with routings for each service operation needed to integrate with OSN or Exchange.oracle.com. These routings contain the transformation programs needed to convert messages from OAG to PSXML and vice versa. These routings can be altered to fit your environment.

    See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Routing Definitions"*

7. Review or change queue definitions. The PeopleSoft system is delivered with queues for each service operation needed to integrate with OSN or Exchange.oracle.com.

    See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Service Operation Queues"*

8. Setup node connectors. The PeopleSoft system is delivered with the fscm_epo_OSNListeningConnector connector.

9. To integrate with Exchange.oracle.com, complete the direct connect setup steps located in the "Integration with Direct Connect Suppliers" chapter of this PeopleBook.

PeopleSoft users can leverage OSN's Transaction Monitor to view message statuses and errors, use self-service tools to connect to OSN, and test the ability to transmit inbound and outbound documents. Users can receive notifications of incoming messages that are applicable to them. For example, PeopleSoft Payables administrators can receive alerts for inbound invoices only.

Pages Used to Setup the Integration to the Oracle Supplier Network

Page Name	Definition Name	Navigation	Usage
Direct Connect Methods	PV_DC_TYPE	eProcurement, Administer Procurement, Maintain Supplier Integration, Direct Connect Methods	Define direct connect integration methods and standards. Use the method, EXCH_ORACLE, to setup the punchout to the Exchange.oracle.com website. See Chapter 9, "Integrating with Direct Connect Suppliers," Defining the Direct Connect Methods page, page 208.
EDX PO Dispatch Types	PV_EDX_TYPE	eProcurement, Administer Procurement, Maintain Supplier Integration, EDX PO Dispatch Types	Define dynamic dispatch types for EDX purchase orders. For dispatching purchase orders to the Oracle Supplier Network, use the EDX PO Dispatch Type of *OAG72*. See Chapter 14, "Dispatching Purchase Orders in PeopleSoft eProcurement," page 367.

Page Name	Definition Name	Navigation	Usage
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers	Link suppliers from other systems (including OSN) to PeopleSoft vendors. See Chapter 3, "Determining Technical Implementation Options," Using the Linked Suppliers page, page 46.
Service Operations - General	IB_SERVICE	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Service Operation Definitions • PeopleTools, Integration Broker, Integration Setup, Service Operations	Activate service operations.
Node Definitions	IB_NODE	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Node Definitions • PeopleTools, Integration Broker, Integration Setup, Nodes	Create or change a node. The PeopleSoft system is delivered with the PSFT_EXCH_ORACLE node for the Exchange.oracle.com website and the PSFT_ORACLE_SUPPLIER_NETWORK node for the Oracle Supplier Network. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Adding and Configuring Nodes"*
Routing Definitions	IB_ROUTINGDEFN	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions • PeopleTools, Integration Broker, Integration Setup, Routings	Activate the routing that is used with the node. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Routing Definitions"*

Page Name	*Definition Name*	*Navigation*	*Usage*
Parameters	IB_ROUTINGDEFNDOC	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions Click the Parameters tab. • PeopleTools, Integration Broker, Integration Setup, Routings Click the Parameters tab.	Set up routing parameters including transformation programs. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Routing Definitions"*
Queue Definitions	IB_QUEUEDEFN	PeopleTools, Integration Broker, Integration Setup, Queues	Create or change queue definitions. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Service Operation Queues"*
Connectors	IB_NODECONN	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Node Definitions Click the Connectors tab. • PeopleTools, Integration Broker, Integration Setup, Nodes Click the Connectors tab.	Set up node connectors. This page enables you to associate gateways and connectors to a node. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Integration Broker Connector SDK"*

Activating the Service Operations

PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM.

To setup this service operation use the information in this table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.1 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

Service Operation	Direction and Type	Handlers	Chunking Available ?	Integrates With
PV_DC_CONNECT_REQST	Outbound Synchronous		No	Exchange.oracle.com website
PV_ORDER	Outbound Asynchronous		No	Oracle Supplier Network
PURCHASE_ORDER_ACKNOWLEDGEMENT	Inbound Asynchronous	PurchaseOrderAcknowledgement	No	Oracle Supplier Network
ADVANCED_SHIPPING_RECEIPT	Inbound Asynchronous	AdvancedShippingReceipt	No	Oracle Supplier Network
EM_VOUCHER_IN	Inbound Asynchronous	EmVoucherIn	No	Oracle Supplier Network

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook, "Implementing Integrations," Setting Up Service Operations

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Adding Requisition Lines Using the Exchange Oracle Website

Direct connect enables PeopleSoft eProcurement requisition users to interact directly with a supplier's website. Exchange.oracle.com is a website containing supplier-hosted item catalogs. Using punchout, PeopleSoft users can go from an eProcurement requisition to Exchange.oracle.com where they can search the item catalogs of one or multiple suppliers and then select items to be placed on their requisition. The requisition is eventually converted to a purchase order, which can be dispatched to the Oracle Supplier Network. The steps to punchout to Exchange.oracle.com are:

1. The PeopleSoft user navigates to the Web tab of an eProcurement requisition (eProcurement, Create Requisition, Add Items and Services Select the Web tab.) and selects the EXCH_ORACLE link.

2. The system saves the current requisition. This preserves the state of the requisition so that changes made since the creation or the last save of the requisition are not lost.

3. Using the synchronous service operation PV_DC_CONNECT_REQST and the routing EXCH_ORACLE, the PeopleSoft Integration Broker performs a hand shake with the Exchange.oracle.com.

    a. The outbound request uses the transformation program PV_POSR_EXCH to sent a message to Exchange.oracle.com with the proper credentials.

    b. Exchange.oracle.com processes the request and sends a response (inbound to PeopleSoft) using the transformation program PV_RSP_EXCH. This response also sends a URL and redirects the PeopleSoft user to the search page within Exchange.oracle.com

4. The user browses the Exchange.oracle.com website and adds items to the shopping cart.

5. Once the user checks out the shopping cart in Exchange.oracle.com, the items are loaded into the PeopleSoft eProcurement requisition using the transformation program PV_POOM_EXCH. These lines inherit the requisition's line default values just as any other item being added. The system displays the requisition Summary page to the user.

The PeopleSoft system is delivered with the following setup for punchout to Exchange.oracle.com, this data may need to be altered for your environment:

*   Direct Connect Method: EXCH_ORACLE (eProcurement, Administer Procurement, Maintain Supplier Integration, Direct Connect Methods)

*   Service Operation: PV_DC_CONNECT_REQST

*   Message: PV_DC_CONNECT_REQST version 1

*   Application Engine transformation programs: PV_POSR_EXCH, PV_RSP_EXCH and PV_POOM_EXCH.

*   Routing: EXCH_ORACLE

*   Node: PSFT_EXCH_ORACLE

For additional setup information, see the Integrating with Direct Connect Suppliers chapter of this PeopleBook.

Pages Used to Add Requisition Lines Using the Exchange Oracle Website

Page Name	Definition Name	Navigation	Usage
Web	PV_MERCHANTS	eProcurement, Create Requisition, Add Items and Services Select the Web tab.	Select the Exchange Oracle link to access Exchange.oracle.com.

Sending Purchase Orders and Change Order to the Oracle Supplier Network

Purchase orders can be sent to OSN suppliers using the following steps:

1. The purchase orders are created and approved in either PeopleSoft eProcurement or PeopleSoft Purchasing. Attachments can be included with the purchase orders at either the header level or line level.

2. The purchase orders are dispatched to an OSN supplier using the electronic data exchange (EDX) method in either PeopleSoft eProcurement or PeopleSoft Purchasing. The dispatch process places the purchase orders in the PeopleSoft outbound staging tables.

3. The PeopleSoft Integration Broker picks up the purchase order data in the outbound staging tables and uses the service operation PV_ORDER to create the message. The routing on the service operation contains the transformation program PV_ORD_OAG that converts the purchase order from PSXML to OAG XML.

4. The connector address, fscm_epo_OSNListeningConnector, receives the XML message from PeopleSoft eProcurement, wrap the final message in a multipart MIME envelope, and then ships the message to OSN. This connector is also responsible for handling PO attachments and including them with the corresponding purchase order in the message to OSN.

5. The Oracle Supplier Network passes the purchase order to the OSN supplier.

Change orders follow the same business process flow but only the modified lines are sent to OSN and the XML document indicates that this is a change order instead of a purchase order.

In order to send a PeopleSoft purchase order or change order to the Oracle Supplier Network the OSN supplier must be defined on the Linked Supplier page with a EDX PO Dispatch Type of OAG72. The OSN supplier ID and supplier type are also on this page to link the PeopleSoft vendor ID to the OSN supplier.

The PeopleSoft system is delivered with the following setup for transmitting purchase orders to OSN, this data may need to be altered for your environment:

- Service operation: PV_ORDER

- Message: PV_ORDER version 1

- Application Engine transformation program: PV_ORD_OAG

- Routing: ORACLE_SN_ORDER

- Node: PSFT_ORACLE_SUPPLIER_NETWORK

- Queue: PV_MS_ORD_DISPATCH

- Connector: fscm_epo_OSNListeningConnector.

PeopleSoft Service Operation	*OSN Transaction Name*	*cXML Equivalent*
PV_ORDER	OAG Process PO 007	cXML Order Request
PV_ORDER	OAG Change PO 006	cXML Order Request (update)

Receiving Purchase Order Acknowledgements from the Oracle Supplier Network

Purchase order acknowledgements (POAs) can be sent from OSN suppliers to PeopleSoft using the following steps:

1. The Oracle Supplier Network transmits the POAs from the OSN supplier.

2. The PeopleSoft connector, fscm_epo_OSNListeningConnector, catches the inbound message which is routed to the PURCHASE_ORDER_ACKNOWLEDGEMENT service operation.

3. The routing on the service operation contains the transformation program SAC_OAG72POA that converts the POAs from OAG XML to PSXML.

4. The handler PurchaseOrderAcknowledgement, that is defined on the service operation, is executed to update the POA tables in PeopleSoft.

5. POAs can be reviewed on the Manage PO Acknowledgements page in PeopleSoft (Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements).

6. If the POA results in changes, a change order may be generated.

There are two options for receiving a purchase order acknowledgement from the supplier. The first is a POA which uses the PeopleSoft Purchasing functionality, and stores the status within Purchasing tables. The second is the POR (purchase order response) where you can view the status from the PO Dispatch Message page (eProcurement, Buyer Center, Dispatch Purchase Order, Dispatch Message Log).

The PeopleSoft system is delivered with the following setup for receiving purchase order acknowledgements from OSN, this data may need to be altered for your environment:

• Service operation: PURCHASE_ORDER_ACKNOWLEDGEMENT

• Message: PURCHASE_ORDER_ACKNOWLEDGEMENT version 1

• Application Engine transformation program: SAC_OAG72POA

• Routing: ORACLE_SN_POA

• Node: PSFT_ORACLE_SUPPLIER_NETWORK

• Queue: PURCHASE_ORDER

• Handler: PurchaseOrderAcknowledgement

• Connector: fscm_epo_OSNListeningConnector.

PeopleSoft Service Operation	OSN Transaction Name	cXML Equivalent
PURCHASE_ORDER_ACKNOWLEDGEMENT	OAG Acknowledge PO 008	cXML Confirmation Request

PeopleSoft Service Operation	OSN Transaction Name	cXML Equivalent
PURCHASE_ORDER_ACKNOWLEDGEMENT	OAG Change Sales Order 008	(no cXML equivalent)

Receiving Advanced Shipment Notifications from the Oracle Supplier Network

Advanced shipping notifications (ASNs) can be sent from OSN suppliers to PeopleSoft where they are received as advanced shipping receipts (ASRs). The following steps are used:

1. The Oracle Supplier Network transmits the advanced shipping notifications from the OSN supplier.

2. The PeopleSoft connector, fscm_epo_OSNListeningConnector, catches the inbound message which is routed to the ADVANCED_SHIPPING_RECEIPT service operation.

3. The routing on the service operation contains the transformation program SAC_OAG72ASN that converts the ASNs in OAG XML to the ASRs in PSXML.

4. The handler AdvancedShippingReceipt, that is defined on the service operation, is executed to update the Receipt Load tables in PeopleSoft.

5. The Receipt Loader process is then executed to create a receipt, which may then be approved by an administrator.

6. ASRs can be reviewed on the ASR Review page in PeopleSoft.

Note. A link to the PeopleSoft eSettlements application and to the PeopleSoft eSupplier Connection application is provided within the Oracle Supplier Network on the Trading Partners section.

The PeopleSoft system is delivered with the following setup for receiving ASNs from OSN, this data may need to be altered for your environment:

• Service operation: ADVANCED_SHIPPING_RECEIPT

• Message: ADVANCED_SHIPPING_RECEIPT version 2

• Application Engine transformation program: SAC_OAG72ASN

• Routing: ORACLE_SN_ASN

• Node: PSFT_ORACLE_SUPPLIER_NETWORK

• Queue: ADVANCED_SHIPPING_NOTICE

• Handler: AdvancedShippingReceipt

• Connector: fscm_epo_OSNListeningConnector.

PeopleSoft Service Operation	OSN Transaction Name	cXML Equivalent
ADVANCED_SHIPPING_RECEIPT	OAG Show Shipment 005	cXML Ship Notice Request

Pages Used to Receive Advanced Shipment Notifications from the Oracle Supplier Network

Page Name	*Definition Name*	*Navigation*	*Usage*
Load Purchase Order Receipts	RUN_RECVLOAD	Purchasing, Receipts, Load Receipts	Run the Receipt Load Application Engine process (PO_RECVLOAD) to load receipt data from the PeopleSoft staging tables into the PeopleSoft Purchasing records. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Receiving Shipments," Loading Receipts Received Using EIPs and EDC.
ASR Review	RECV_AOLN_EC	Purchasing, Receipts, Review Receipt Information, Advanced Shipment Receipts, ASR Review	Access information about receipts received using the ADVANCED_SHIPPING_RECEIPT Enterprise Integration Point (EIP) or created by supplier-entered ASNs. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Receiving Shipments," Using the ASR EIP.

Receiving Invoices from the Oracle Supplier Network

Invoices can be transmitted from OSN suppliers to PeopleSoft where they are received as vouchers in PeopleSoft Payables. The following steps are used:

1. The Oracle Supplier Network transmits the invoice from the OSN supplier.

2. The PeopleSoft connector, fscm_epo_OSNListeningConnector, catches the inbound message which is routed to the EM_VOUCHER_IN service operation.

3. The routing on the service operation contains the transformation program SAC_OAG72INV that converts the invoices in OAG XML to vouchers in PSXML.

4. The handler EmVoucherIn, that is defined on the service operation, is executed to update the voucher staging tables in PeopleSoft.

5. The Voucher Build process is then executed to create a voucher.

6. The Voucher Inquiry page can be used to review vouchers.

Note. In order to receive invoices from OSN suppliers, PeopleSoft Payables or PeopleSoft eSettlements must be installed. A link to the PeopleSoft eSettlements application and to the PeopleSoft eSupplier Connection application is provided within the Oracle Supplier Network on the Trading Partners section.

The PeopleSoft system is delivered with the following setup for receiving invoices from OSN, this data may need to be altered for your environment:

• Service operation: EM_VOUCHER_IN

• Message: EM_VOUCHER_IN version 1

• Application Engine transformation program: SAC_OAG72INV

• Routing: ORACLE_SN_VOUCHER_IN.

• Node: PSFT_ORACLE_SUPPLIER_NETWORK

• Queue: EM_VOUCHER_IN

• Handler: EmVoucherIn

• Connector: fscm_epo_OSNListeningConnector.

PeopleSoft Service Operation	OSN Transaction Name	cXML Equivalent
EM_VOUCHER_IN	OAG Process Invoice 002	cXML Invoice Detail

Pages Used to Receive Invoices from the Oracle Supplier Network

Page Name	Definition Name	Navigation	Usage
Voucher Build	VCHR_BATCH_RQST	Accounts Payable, Batch Processes, Vouchers, Voucher Build	Run this process to create voucher record sets from many sources including XML invoices. See *PeopleSoft Enterprise Payables 9.1 PeopleBook*, "Processing Batch Vouchers."
Voucher Inquiry	AP_VOUCHER_INQUIRY	Accounts Payable, Review Accounts Payable Info, Vouchers, Voucher, Voucher Inquiry	Search for and review vouchers and any payment information. See *PeopleSoft Enterprise Payables 9.1 PeopleBook*, "Reviewing Voucher, Payment, and Vendor Information," Reviewing Voucher Information.

Chapter 8

Integrating with a Marketplace

This chapter provides an overview of the integration between a Marketplace and PeopleSoft eProcurement and discusses how to:

* Set up Marketplace suppliers and buyers.

* Set up integration with a Marketplace.

* Load Marketplace catalog items into PeopleSoft eProcurement.

* Use price and availability check.

* Integrate PeopleSoft eProcurement transactions with a Marketplace.

Understanding the Integration Between a Marketplace and PeopleSoft eProcurement

This overview discusses:

* Integration between a Marketplace and PeopleSoft eProcurement.

* Marketplace integration set up.

* Marketplace EIPs.

* The Business Process Execution Language Process Manager.

Integration Between a Marketplace and PeopleSoft eProcurement

A Marketplace is an electronic trading community in which buyers and sellers use a common internet portal. Integrating the eProcurement system with Marketplace suppliers enables you to review the latest supplier catalogs and prices in a Marketplace, and then download these catalogs into eProcurement. When you connect to a Marketplace with eProcurement, you can:

* Load or update items from a Marketplace into eProcurement catalogs and use these items on eProcurement requisitions and purchase orders.

* Pass purchase orders and change orders that are created in eProcurement to a Marketplace where suppliers receive the orders and review them.

- Pass the supplier's response to the purchase order from a Marketplace to eProcurement.

  In a Marketplace, if you are using xCBL 2.0 or Business Interlinks, the supplier responds by accepting or rejecting the purchase order. This response is passed to eProcurement where it is inserted in the PO Dispatch Message Log page. The status of the PO in eProcurement changes to *Dispatched.*

- Load or create a receipt using advanced shipment receipt (ASR).

- Load or create an voucher or invoice for the purchase order.

- Use the price check feature in eProcurement to update an item's price to match the current price in a Marketplace.

  Users receive the latest price for an item, which is important when prices frequently fluctuate.

- Use the availability check feature in eProcurement to update an item's available quantity to match the supplier's available quantity in a Marketplace.

  Users know before submitting an order whether stock is currently available.

- Use the order status feature in eProcurement to request the current status of the purchase orders submitted to a Marketplace.

Note. Not all suppliers support all features of this integration. For example, availability check will not work unless the supplier has integrated their inventory system with a Marketplace.

Marketplace Integration Set Up

To set up the connection between eProcurement and a Marketplace:

1. Set up Marketplace suppliers as vendors, using the Vendor Information component.

2. Set up Marketplace suppliers as eProcurement vendors, using a Marketplace Supplier Setup page.

3. Associate the SetID that is used in the eProcurement record group as a buyer in a Marketplace using the Marketplace Buyers - Buyer Setup pages.

   Note. All transactions for eProcurement are stored by using the business unit as a key field. These business units are associated with the eProcurement record group (PV_01) by using a SetID on the Table Control - Record Group page. In order to pass transactions to a Marketplace, the SetIDs that are used must be defined as a Marketplace buyer using the Marketplace Buyers - Buyer Setup page.

   Note. If you are using xCBL 2.0 or Business Interlinks, then you need to enter the internet address of the Integration Broker Gateway connector on the Buyer Setup page. If you use Integration Broker, the internet address is not required.

4. Synchronize shared data that is transferred between eProcurement and a Marketplace.

   To prevent validation errors during the transfer of data between eProcurement and a Marketplace, ensure that common control data is identified by the same codes. This common data includes units of measure, currency codes, country codes, language codes, and so on.

Marketplace EIPs

To support integrated implementations in which you use a third-party system to acquire goods and services, eProcurement provides these enterprise integration points (EIP):

PV_AVAIL_CHECK_REQ	Checks for the availability of items with a supplier.
PV_AVAIL_CHECK_RESP	The supplier responds with the availability of the items.
PV_MS_RESP_MSG	eProcurement PO response from a Marketplace.
PV_ORD_STS_REQ	Checks the order status with the external system.
PV_ORD_STS_RESP	eProcurement gets a response to the order status request.
PV_PRICE_CHECK_REQ	Checks prices available from the Marketplace supplier.
PV_PRICE_CHECK_RESP	Gets the response to the price check request.

The Business Process Execution Language Process Manager

The Business Process Execution Language Process Manager (BPEL PM or BPEL) provides a way for customers, developers, and implementers to create and modify entire business processes or small components within a specific business process.

This diagram illustrates the BPEL process flow for PeopleSoft's Procure To Pay business process:
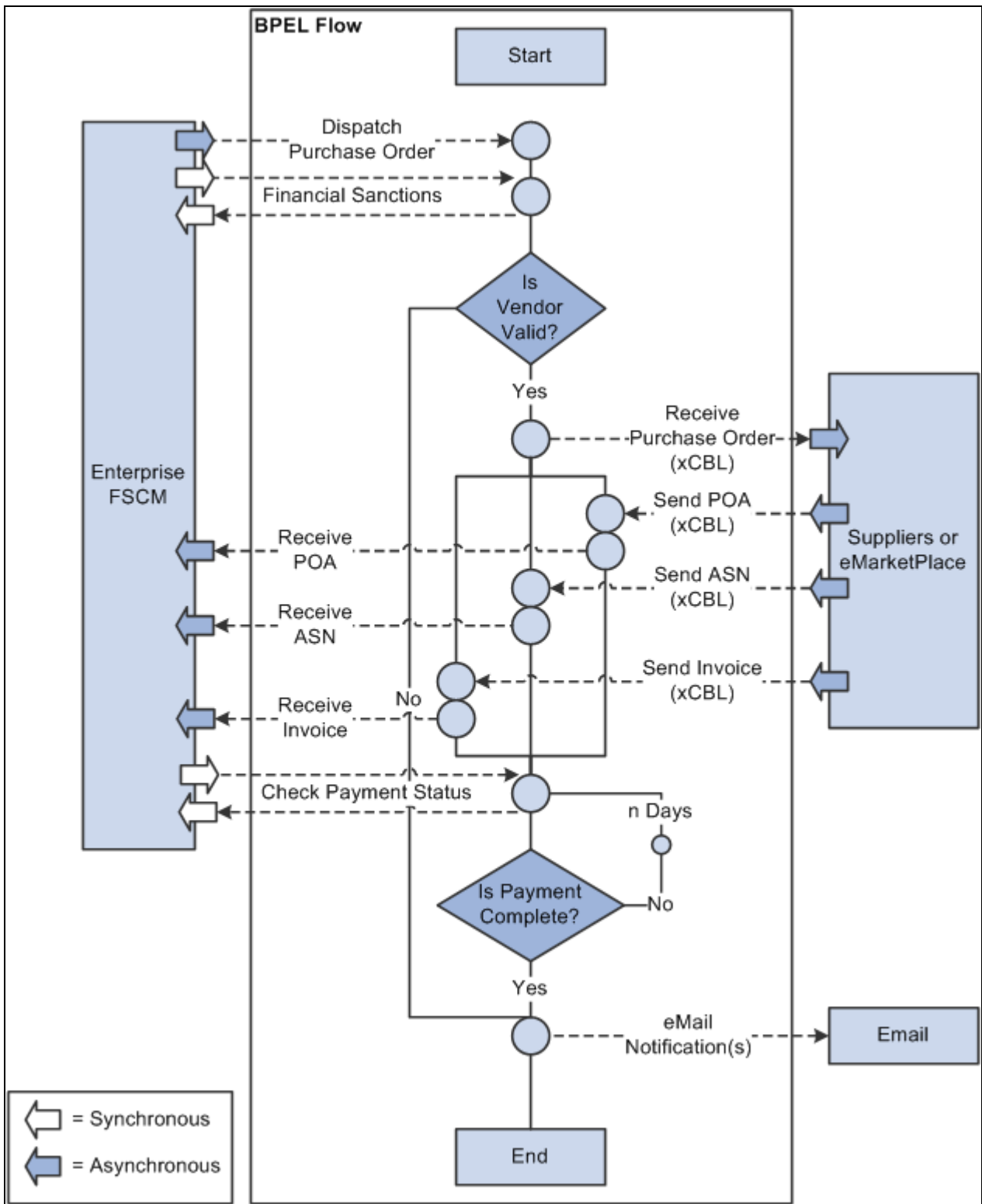
Procure to Pay business process using BPEL

The BPEL process is initiated when a purchase order (PO) is dispatched from PeopleSoft eProcurement. A BPEL activity receives the PO and assigns the vendor information based on the message type specified in the Web Services Description Language (WSDL) of the Financial Sanctions service definition. If the Financial Sanction verification indicates that the supplier is not blocked then BPEL sends the PO to the supplier. If the Financial Sanction verification indicates that the suppler is blocked, then the process sends a notification to the Financial and Supply Chain Management (FSCM) system with the Financial Sanction information and ends the process.

After a PO is sent to a supplier the ProcureToPay instance waits for the purchase order acknowledgement (POA), advanced shipment notification (ASN), and invoice response from the supplier. After the POA is received by the BPEL PM it invokes the PURCHASE_ORDER_ACKNOWLEDGEMENT service operation of the FSCM system. In the same manner ASN (ADVANCED_SHIPPING_RECEIPTS) and Invoice (EM_VOUCHER_IN) documents are processed in the FSCM system. The BPEL instance waits in parallel for these supplier response documents and processing is not dependent on the order in which they are received.

After all three documents are received and the BPEL instance successfully sends them to the enterprise FSCM system, the BPEL process assigns a variable with information necessary to request an invoice status check. The same variable is passed as a request message by invoking the invoice status check service. The content of the variable is derived from the PO and invoice documents. After the invoice status request is sent to Accounts Payable the instance iteratively checks the completion of the invoice payment until it is complete. When the payment for the invoice is complete it initiates an email notification reporting the completion of "ProcureToPay" instance.

See Also

PeopleSoft Enterprise Order to Cash Common Information 9.1 PeopleBook, "Maintaining Additional Customer Information," Validating Financial Sanctions

Prerequisites

Before integrating a Marketplace with eProcurement, all Marketplace suppliers to be used in eProcurement must be set up as PeopleSoft eProcurement vendors.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."

Common Elements Used in This Chapter

Item SetID	The SetID that should be used when these items are added to the PeopleSoft Item Master table.
SetID	The SetID associated with the vendor that you are linking to a Marketplace supplier.
Supplier ID	The supplier ID in a Marketplace.
Return to Administer Procurement	Click to access the Administer Procurement Main page. This link is available on multiple eProcurement pages.

Setting Up Marketplace Suppliers and Buyers

To set up linked suppliers for a Marketplace, use the Linked Supplier component (PV_MS_SUPPLIERS).

To set up Marketplace buyers and buyer options, use the Marketplace Buyers component.

This section discusses how to:

• Set up Marketplace suppliers.

• Identify SetIDs to be defined as Marketplace buyers.

• Set up Marketplace buyers.

• Define Marketplace buyer options.

Pages Used to Set Up Marketplace Suppliers and Buyers

Page Name	Definition Name	Navigation	Usage
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement Click the Maintain Supplier Integration link. Click the Linked Suppliers link.	Set up Marketplace suppliers as PeopleSoft vendors. See Chapter 3, "Determining Technical Implementation Options," Using the Linked Suppliers page, page 46.
Marketplace Buyer Setup	PV_MS_SEC_BUYER	eProcurement, Administer Procurement Click the Maintain Supplier Integration link. Click the Marketplace Buyers link.	Set up Marketplace buyers so that purchase orders, responses, and other information can be exchanged.
Marketplace Buyer Options	PV_MS_BUYER_OPT	From the Marketplace Buyer Setup page, click the Buyer Options tab.	Define Marketplace buyer options. Test the connection and view transmission logs between PeopleSoft eProcurement and a Marketplace. Test the sending and receiving of information including: purchase orders, price checks, availability checks, and order status checks.

Identifying SetIDs to be Defined as Marketplace Buyers

The Marketplace Buyers component enables you to define and test the connection to a Marketplace. The PeopleSoft eProcurement application is defined as a buyer within a Marketplace, so that information can be exchanged.

The SetID defines a Marketplace buyer, which is your eProcurement application. If you have multiple business units for PeopleSoft eProcurement, you might have multiple Marketplace buyers.

To determine the SetIDs that must be defined as Marketplace buyers:

1. Identify the Purchasing business units that are used to record eProcurement purchase orders and pass purchase orders to a Marketplace.

2. Access the Tableset Control - Record Group page.

   In the Set Control Value field, enter the business unit. On the Tableset Control - Record Group page, identify the SetID that is used for the eProcurement record group, which is PV_01.

3. Use the Marketplace Buyers - Buyer Setup page to define a buyer for this SetID.

See Also

Setting up Marketplace Buyers

Access the Marketplace Buyer Setup page (eProcurement, Administer Procurement, Maintain Supplier Integration, Marketplace Buyers).

Marketplace Buyer Setup page

Define a Marketplace buyer for each SetID used to link a business unit to the PeopleSoft eProcurement record group PV_01.

Marketplace URL (Marketplace uniform resource locator)	Enter the Marketplace internet address that is used by eProcurement to pass XML documents including; purchase orders, order status checks, and item price and availability checks.
	Note. If you are using xCBL 2.0 or Business Interlinks, then you need to enter this URL. If you use Integration Broker or BPEL, the URL is not required.
Marketplace Partner ID	Enter a 64-bit identifier assigned to every Marketplace enterprise-level trading partner. Participant IDs are defined by a Marketplace supplier and cannot be modified.
Buyer User ID	Enter a user ID that enables the trading partner to gain access to a Marketplace. PeopleSoft eProcurement is a trading partner with Marketplace suppliers.
Buyer Password	Enter the buyer's password.
Gateway URL (gateway uniform resource locator)	Enter the PeopleSoft gateway internet address to which it sends suppliers' responses. After these responses (which are formatted as XML documents) arrive at the PeopleSoft gateway, the system launches PeopleCode to update PeopleSoft eProcurement.
	Note. If you are using xCBL 2.0 or Business Interlinks, then you need to enter this URL. If you use Integration Broker or BPEL, the URL is not required.

Defining Marketplace Buyer Options

Access the Marketplace Buyer Options page (From the Marketplace Buyer Setup page, click the Buyer Options tab).

Marketplace Buyer Options page

Note. In order to have read or write access to the log files, the log file location must be accessible by the application server, process scheduler server, and the client. Write access should be granted to the application server and the process scheduler server. The client servers should have read access.

Log Files

File Type   Select the type of log file that you want to view. Values are:

Availability Check: This file is generated when PeopleSoft eProcurement users compare the supplier's available quantity to the requisition quantity. If the quantity requested exceeds the available quantity, a message appears giving the user an opportunity to change the requisition quantity. Click the Check Price and Availability button on the Search Catalog - Item Description page to launch this action. You can launch this action using the Test Marketplace Connectivity section of this page.

Order Status Check: This file is generated when PeopleSoft eProcurement users request the current status of the purchase orders they submitted to a Marketplace. Click the Get Market Order Status button on the PO Dispatch Message Log page or select Run Order Status Check on the Process Marketplace Orders Process page to launch this action. You can launch this action using the Test Marketplace Connectivity section of this page.

Price Check: This file is generated when PeopleSoft eProcurement users update an item's price to match the current price in a Marketplace. Click the Check Price and Availability button on the Search Catalog - Item Description page to launch this action. You can launch this action using the Test Marketplace Connectivity section of this page.

Purchase Order: This file is generated when purchase orders created in PeopleSoft eProcurement are transmitted to a Marketplace. You can launch this action by running the Process Marketplace Orders process.

View Request   Select to review the log file generated when sending the data transmission to a Marketplace. This XML data can be used to help debug problems with transmitting data to a Marketplace. The type of log file is based on the selection in the File Type field. The system displays the last transmission of this file type located in the directory entered in the Log File Location field.

View Response   Select to review the log file generated when a Marketplace sends a response to PeopleSoft eProcurement. This XML data can be used to help debug problems with transmitting data from a Marketplace. The type of log file that appears is based on the selection in the File Type field. The system displays the last transmission of this file type located in the directory entered in the Log File Location field. If you use Integration Broker and select the file type *Purchase Order,* the log file does not contain any information, since the purchase order action is an asynchronous transmission and no response is received from a Marketplace.

Test Marketplace Connectivity

Price   Select to launch a price check, which instantly updates an item's price to match the current price in a Marketplace. The item entered in the Item ID field is used for this price check. The system generates a transmission log and stores it in the directory entered in the Log File Location field.

Availability	Select to launch an availability check, which retrieves the supplier's available quantity from a Marketplace. The item entered in the Item ID field is used for this availability check. A transmission log is generated and stored in the directory entered in the Log File Location field.
Status	Select to launch an order status check, which retrieves the current status of a purchase order within a Marketplace. The purchase order entered in the Purchase Order field is used for this order status check. A transmission log is generated and stored in the directory entered in the Log File Location field.

See Also

Setting Up Integration with a Marketplace

This section provides an overview of the Integration Broker between a Marketplace and eProcurement and discusses how to:

- Set up nodes.

- Activate routings.

- Activate service operations.

Understanding the Integration between a Marketplace and eProcurement

PeopleSoft integrates to a Marketplace to:

- Enable companies to easily register with Marketplaces.

- Create requisitions within eProcurement, while viewing catalogs in the Marketplace.

- Enable suppliers to send Purchase Order Acknowledgements (POA).

- Enable suppliers to send Advanced Shipment Notifications (ASN).

- Generate receipts when Advanced Shipment Receipts (ASR) are received.

- Enable suppliers to send invoices to the company, if you are using PeopleSoft Payables.

- Create vouchers for inbound invoices.

This diagram illustrates the flow of information from PeopleSoft, through the Integration Broker, and to the Marketplace. Data such as registration, purchase orders, and change orders flow from PeopleSoft to Marketplace. Data such as PO acknowledgements, advanced shipment notices, and invoices flow from MarketPlace to PeopleSoft. Order status requests can flow between PeopleSoft and MarketPlace:
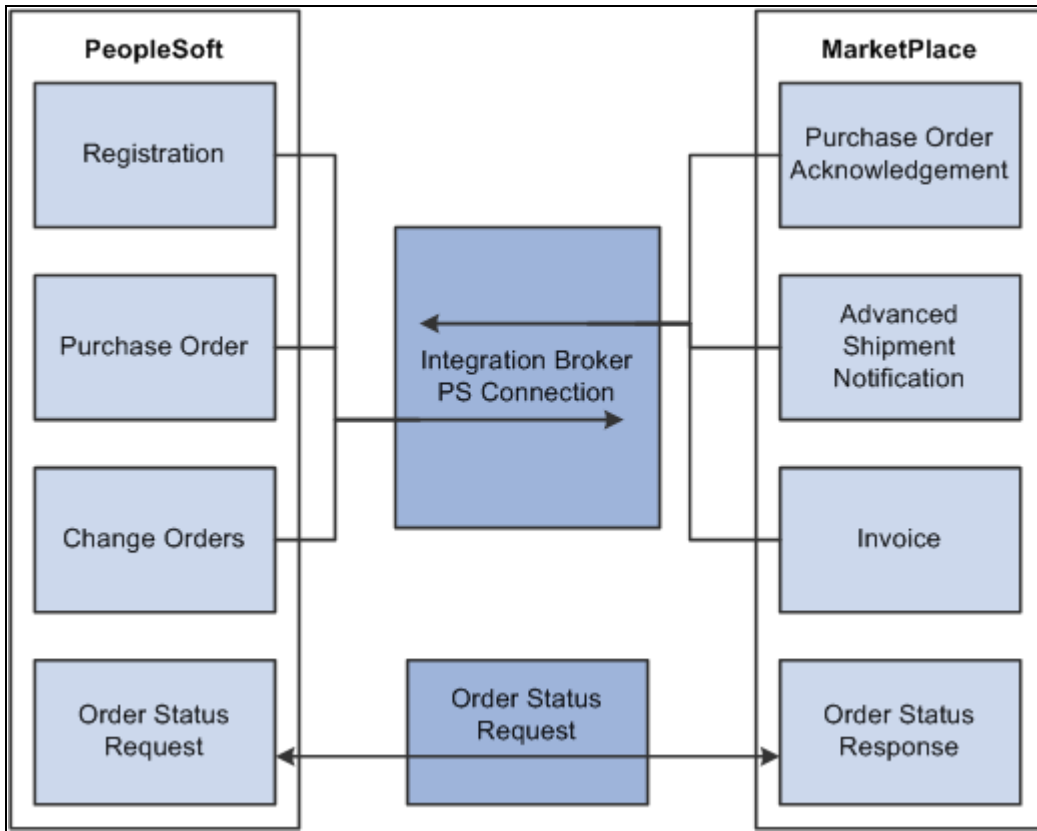
PeopleSoft Integration Broker integration with a Marketplace

Understanding Setup Steps for Marketplace Integration

This section lists the steps that are required to integrate with a Marketplace:

To utilize the purchase order acknowledgement, advanced shipment notification, and invoice transaction capabilities, the administrator needs to configure the Integration Broker. These elements need to be set up:

1. Activate the service operation.

2. Activate the routing.

Integration Broker works within the PeopleSoft system to send and receive information to and from external systems, such as the Marketplace. In this case, the job of the Integration Broker is to send and receive documents that come to and from the Marketplace. The purpose of the Integration Broker is to aid in the translation of the xCBL 3.0 documents used by the Marketplace into the PSXML format that the PeopleSoft system recognizes. Integration Broker accomplishes this translation by using a combination of nodes, routings, and service operations.

Integration Broker Component	Purpose
Service Operation	The service operation is a template for the data that the application sends and receives.

Integration Broker Component	Purpose
Routing	The route tells the system how the Marketplace works with PeopleSoft eProcurement. Details include what service operation to use for the two systems to communicate, and what Application Engine translation to use to translate the format from xCBL 3.0 to the PeopleSoft format.

Pages Used to Set Up Integration with a Marketplace

Page Name	Definition Name	Navigation	Usage
Service Operations - General	IB_SERVICE	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Service Operation Definitions • PeopleTools, Integration Broker, Integration Setup, Service Operations	Activate service operations.
Routing Definitions	IB_ROUTINGDEFN	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions • PeopleTools, Integration Broker, Integration Setup, Routings	Activate the routing that is used with the node. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Routing Definitions"*

Activating Service Operations

PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM.

To setup this service operation use the information in this table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.1 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

Service Operation	Direction and Type	Handlers	Chunking Available?	Integrates With
PV_AVAIL_CHECK_REQ	Outbound Synchronous		No	third-party system
PV_AVAIL_CHECK_RESP	Inbound Asynchronous		No	third-party system
PV_MS_RESP_MSG	Inbound Asynchronous	PvMsRespMsg	No	third-party system
PV_ORDER	Outbound Asynchronous		No	third-party system
PV_ORDER_REQ	Outbound Synchronous		No	third-party system
PV_ORD_STS_REQ	Outbound Synchronous		No	third-party system
PV_ORD_STS_RESP	Inbound Asynchronous		No	third-party system
PV_PRICE_CHECK_REQ	Outbound Synchronous		No	third-party system
PV_PRICE_CHECK_RESP	Inbound Asynchronous		No	third-party system

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook, "Implementing Integrations," Setting Up Service Operations

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Activating Routings

Access the Routing Definitions page (eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions).

This section discusses how to:

• Activate Marketplace routings.

• Activate BPEL routings.

Activating Marketplace Routings

Activate the Marketplace routings:

See *PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook*, "Understanding SCM Integration."

Activating BPEL Routings

Enter these field values that are specific to BPEL routings:

Routing Name   Select *PV_ORDER_P2P*.

Select the Routings tab and enter these field values that are specific to BPEL routings:

External Alias   Enter *BPEL_P2PAY_ASN* for receiving advanced shipment notifications from the BPEL PM.

Enter *BPEL_P2PAY_INV* for receiving invoices from the BPEL PM.

Enter *BPEL_P2PAY_PO* for sending purchase orders to the BPEL PM

Enter *BPEL_P2PAY_POA* for receiving purchase order acknowledgements from the BPEL PM.

Return to the Routing Definition page, select the Active check box, and click the Save button.

See *PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook*, "Understanding SCM Integration."

Loading Marketplace Catalog Items into PeopleSoft eProcurement

This section provides an overview of loading Marketplace items into PeopleSoft eProcurement and discusses how to:

• Download supplier flat files.

• Extract data from a CUP file.

• Export CUP data.

• Load CUP files.

• Define item import defaults.

• Validate and process imported items.

• Edit imported item categories.

• Maintain imported item statuses.

- Load Marketplace items.

- Correct inventory item load errors.

- Download item attachments.

Understanding Loading Marketplace Items into PeopleSoft eProcurement

After you set up connections to a Marketplace, you can load items from Marketplace catalogs into PeopleSoft eProcurement The items can be loaded into the item master tables or into an express catalog. This section discusses loading items into the item master tables of PeopleSoft. For information on the express catalog option, see the "Setting Up and Using the Express Catalog" section of the "Importing and Searching Supplier Catalogs" chapter of this PeopleBook.

See Chapter 5, "Importing and Searching Supplier Catalogs," Setting Up and Using the Express Catalog, page 133.

When Marketplace items are loaded into the PeopleSoft item master tables, they can be entered on eProcurement requisitions and purchase orders. You can also update prices and check available quantities for Marketplace items in PeopleSoft eProcurement. After you load the items, you should schedule regular updates to capture changes such as price changes, discontinuation of items, or the addition of new items.

To load a CUP (catalog update process) file into the system, complete these steps:

1. Import the product and price files to PeopleSoft eProcurement, using the Import CUP File process (PV_CUP_LOAD).

   This application engine process loads the product and price flat files into the PV_CP_LOAD and PV_CP_CAT_TMP staging tables. The attachment file is loaded into the PV_CP_ITM_XREF table.

2. Use the Validate and Process Imported Items page to validate the CUP file data in the staging tables, adding or changing information as necessary.

3. Use the Edit CUP Item Categories page to review any new item categories added for the items loaded from a Marketplace.

   Each new item category requires a default account (the top level of the PeopleSoft ChartFields). This account is used to record the accounting entries created by ordering items in this item category.

4. Review the CUP status of the item on the CUP Items Status page.

5. When loading non-inventory items, be sure to enter a cost element in the Item Default Values page for the applicable setID. This cost element is used as the default cost element for the new items created by the Load Marketplace Items process.

6. Run the Load Marketplace Items process (PV_CP_ITM_LOAD).

   This process loads items with a status of *Ready to Build Items* (new items) or *Items to be Updated* from the staging tables into the PeopleSoft Item Master tables.

7. Use the Data Definition Maintenance page to review any errors for items that were not loaded properly.

   Select the ITEM transaction type and enter the SetID for the items. Select the stage table option with an *Error* status, then click the Query button. Any errors appear at the bottom of the page.

8. Go to the eProcurement Installation Options page after you have successfully loaded the items.

    If the Catalog Search Type field is populated with *FSE,* run the Item Search Update process. If the Catalog Search Type field is populated with *VSE,* run the Build Verify Search Collection process (PV_SRCH_RUN_INDEX).

    Note. When you select the search catalog method of *FSE,* the system uses a different index table during requisition entry to search for all available items. By running the Item Search Update process, you are updating this index table with the new items. It is important to run this process whenever you add or change any items in PeopleSoft eProcurement.

    If you select the Index Items check box on the Procurement Catalog Load page, this process is run automatically.

This diagram illustrates the process of loading Marketplace items into PeopleSoft eProcurement by creating a CUP file and then loading the data into the PeopleSoft production tables:
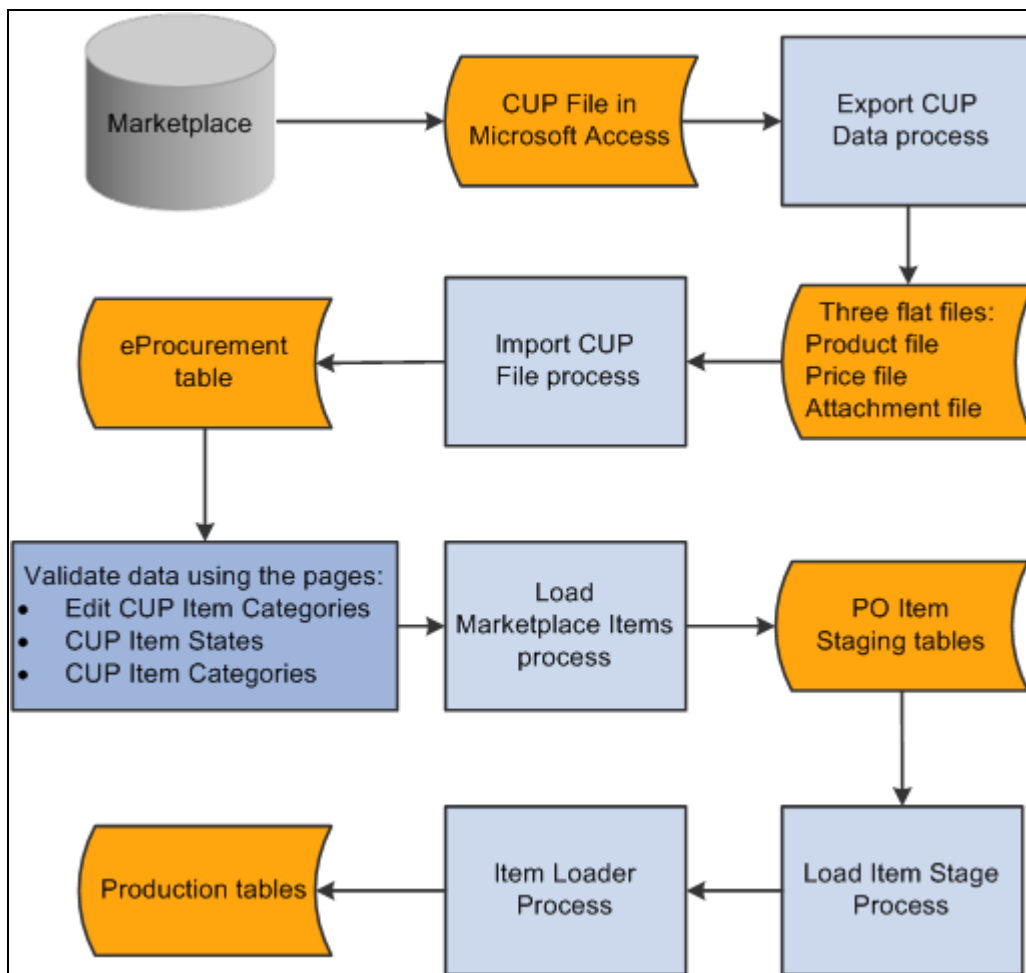
Load Marketplace items into PeopleSoft eProcurement process flow

To set up the system to utilize the CUP Load process, you need to complete these tasks:

1. Provide locations for the product, price, and attachment files from the supplier.

2. Load the CUP file to extract the data from the input files and place them in the Inventory tables.

3. Provide item defaults such as account number and currency information.

4. Validate items being imported into the PeopleSoft system.

5. Correct errors that may occur in the extraction process.

Pages Used to Load Marketplace Catalog Items into PeopleSoft eProcurement

Page Name	Definition Name	Navigation	Usage
Export CUP Data	PS_CUP_EXPORT	On a machine with access to the PeopleSoft Process Scheduler server, select Start, Programs, PeopleSoft Applications, CUP Item Export.	Extract data from a CUP file and store this information in flat files. PS_CUP_EXPORT is a Microsoft Visual Basic program that retrieves data from a third-party Microsoft Access database and places it in a flat file so that the data can then be imported into the PeopleSoft tables. This program is outside of the PeopleSoft application and is delivered on the installation disc.
Procurement Catalog Load	PV_CP_IMPORT_RUN	eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File.	Import CUP files by loading data from the flat files created by the Export CUP File process into the PeopleSoft eProcurement tables.
Item Defaults	PV_CP_RUN_DEFAULTS	eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File Select the Item Defaults tab.	Define item import defaults.
Validate and Process Imported Items	PV_CP_PROCESS	eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items.	Validate and process imported items loaded by the Import CUP File process page into the staging tables PV_CP_LOAD and PV_CP_CAT_TMP.
Edit Imported Item Categories	PV_CP_CATEGORIES	eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items Click the Categories link.	Edit imported item categories for the items loaded from a Marketplace.

Page Name	Definition Name	Navigation	Usage
Imported Item Status	PV_CP_STATUS	eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items Click the View Items link.	Maintain CUP item statuses in the PV_CP_LOAD and PV_CP_CAT_TMP staging tables, correct errors, add more details, and change the item status.
Item Default Values	INV_ITEM_DEFAULTS	Items, Define Controls, Item Default Values	For non-inventory items, enter a cost element in the Item Default Values page for the applicable setID. This cost element is used as the default cost element for the new items created by the Load Marketplace Items process.
Load Item Catalogs	PV_CP_ITM_LOAD	eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items. Click the Load Staged Item button.	Load Marketplace items into PeopleSoft item tables. The data is loaded from the PV_CP_LOAD and PV_CP_CAT_TMP staging tables to the production tables for PeopleSoft items.
Data Def Maint (data definition maintenance)	EO_EIP_CTL_MAINT	eProcurement, Administer Procurement, Maintain Supplier Integration, Correct Item Load Erros.	Correct inventory item load errors.

Downloading Supplier Flat Files

PeopleSoft will search for three files to be on the system to successfully move the supplier data into the PeopleSoft Inventory tables. These three files are:

• A product file containing item information.

• A price file containing pricing information.

• An attachment file containing information on each item's attachments.

The CUP file that you download from a Marketplace may reside in a Microsoft Access database. The Export CUP Data process (PS_CUP_EXPORT.EXE) uses SQL (structured query language) statements to retrieve the necessary data from the Microsoft Access database.

To load Marketplace catalog items into PeopleSoft eProcurement from a Microsoft Access database:

1. Download the supplier's latest CUP file using the instructions on the Marketplace's website.

   The machine in which you run the Export CUP Data process must have Microsoft Data Access Components installed.

2. Navigate to the ps_home\setup folder, and run the program mdac_typ.exe.

3. Install the Microsoft Data Access Components.

4. Extract and export information from the Microsoft Access database to flat files, using the PeopleSoft eProcurement Export CUP Data process (PS_CUP_EXPORT.EXE)

Note. This process builds one to three flat files: a product file containing item information; a price file containing pricing information, and an attachment file containing a cross-reference to the item images and attachments.

See Also

Chapter 5, "Importing and Searching Supplier Catalogs," page 99

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine"

Extracting Data From a CUP File

Not all data in the CUP file is retrieved, only the information needed by PeopleSoft. This Visual Basic (VB) program is delivered with PeopleSoft eProcurement.

PeopleSoft retrieves this information from a CUP file:

Item Information (Product File)

Table	Field	Data Retrieved
Cup_CatUpdate	CreateDate	The item's creation date.
	Cup_SupplierPartnerID	The supplier's identification code.
	EffectiveDate	The item's effective date.
Cup_Partner	TPName	The buyer's trading partner identification.
Cup_PartUpdate	Cup_PartUpdateID	The part update identification code.
	ActionCode	The code identifying the action to be performed on this item. The options are: *A* (add a new item); *D* (delete an item); or *M*(modify an existing item).

Table	Field	Data Retrieved
	PartNum	The item's part number.
	PartNumExt	The part number extension.
	UOM	The unit of measure in which the item is purchased.
Cup_PartUpdateCommodity	CatLevel1, CatLevel2,CatLevel3, and CatLevel4.	The description of the UN/SPSC codes assigned to the item in the AcctLevel1, AcctLevel2, AcctLevel3, and AcctLevel4 fields. The first 30 characters of this field are used for the item category description in the PeopleSoft table ITM_CAT_TBL.
	AcctLevel1, AcctLevel2, AcctLevel3, and AcctLevel4.	The four levels of UN/SPSC codes for the item. These codes are used to categorize the items within a catalog (PeopleSoft tree). All four levels are mandatory; if they are not already in the CUP file, enter them manually on the CUP Item Categories page.
Cup_PartUpdateDesc	ShortDesc	The short description for the item. The value in this field is used to populate several item description fields in PeopleSoft's item tables, including DESCRSHORT (first 10 characters), DESCR (first 30 characters), DESCR60 (first 60 characters), and DESCR_254MIXED (254 characters).
	LongDesc	A longer description for the item that is loaded into the PeopleSoft eProcurement cross-reference table, PV_CP_ITM_XREF. This description appears on the Search Catalog - Item Description page and on the Requisition Summary - Item Description page.
Cup_PartUpdateInfo	MfrPartNum	The manufacturer's part number for the item.

Table	Field	Data Retrieved
	MfrName	The item manufacturer's name.
	LeadTime	The lead time required to deliver the item.
	UnitPrice	The item's price per unit.
Cup_Price	CurrencyCode	The currency in which the item's base price is expressed.
	QtyMin	The minimum quantity of the item that can be purchased.

Pricing Information (Price File)

Table	Field	Data Retrieved
Cup_CatUpdate	Cup_SupplierPartnerID	The supplier's identification code.
Cup_Partner	TPName	The buyer's trading partner identification.
Cup_PartPrice	ActionCode	The action to be performed on this item. The values are: *A* (add a new item); *D* (delete an item); or *M* (modify an existing item).
	PartNum	The item's part number.
	PartNumExt	The part number's extension.
	UOM	The unit of measure in which the item is purchased.
Cup_Price	UnitPrice	The item's price per unit.
	CurrencyCode	The currency in which the item's base price is expressed.

Table	Field	Data Retrieved
	EffectiveDate	The item price's effective date.
	ExpireDate	The item price's expiration date.
	QtyMin	The minimum quantity of the item that can be purchased.

Note. The item's long description is loaded from the CUP file into a cross-reference table called PV_CP_ITM_XREF, and the item's image is loaded into a web server directory. The description and image both appear when you view the item in PeopleSoft eProcurement.

Exporting CUP Data

Use the Export CUP Data process to create the three flat files for the PeopleSoft system to utilize when importing the supplier data into the Inventory tables.

Input Access Database (CUP File)

Input Access Database (CUP File) (input access database (Catalog Update process file))   Enter the directory path and file name of the CUP file that you downloaded from a Marketplace.

Output Text Files

Products   Enter the directory path and file name of the product file that you want to create. This product file contains all additions or changes to the item's definition. Create this file in a directory that is accessible to the process scheduler server.

Prices   Enter the directory path and file name for the price file that you want to create. The price file contains all changes to the price of the item. If you are downloading items for the first time, there aren't any price updates and this file does not exist. Create this file in a directory that is accessible to the process scheduler server.

Attachments   Enter the directory path and file name of the attachment file that you want to create. This file does not contain the actual attachments (that is, images, blueprints, and so forth) but only the file names and extensions of each attachment. The actual attachments are downloaded in a separate step. This attachment file cross-references the names and extensions of each attachment to the corresponding item ID. To create this file, you must have an entry in the Products field. Create this file in a directory that is accessible to the PeopleSoft Process Scheduler server.

Export Data	Click to launch the Export CUP Data process.

Loading CUP Files

Access the Procurement Catalog Load page (eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File).

Procurement Catalog Load page

Note. The product and price files are loaded into the staging tables PV_CP_LOAD and PV_CP_CAT_TMP. This process adds certain defaults that were not in Marketplace catalog tables to required fields in PeopleSoft's Item tables. The attachment file is loaded into the table PV_CP_ITM_XREF.

Import Catalog Items

Source	Enter the source that provides the data.
Item SetID	Enter the SetID that the system uses in the item table.
Vendor SetID	Enter the SetID that the system uses in the vendor table.

Product File	Enter the location and name of the flat file containing the item details. The product file must be accessible from the PeopleSoft Process Scheduler server.
Attachment File	Enter the location and name of the flat file containing cross-references to images and attachments for the items. PeopleSoft enables you to store and retrieve attachments to an ftp server. The flat file cross-references the names and extensions of each attachment to the corresponding item ID.The attachment can be a Microsoft Word file or Excel spreadsheet for example. Requesters and buyers can view these attachments. The attachment is automatically added to the PO that is created from the requisition and can be sent to the vendor.
Price File	Enter the file location and name of the flat file containing the pricing details for the items. The price file must be accessible from the process scheduler server.
Tree Name	Enter the PeopleSoft tree (item catalog) to be used when this process loads the new categories from the CUP file. If you leave this field blank, the value appears by default from the eProcurement Installation Options page. To ensure that this item catalog is accessible to the user creating requisitions, either add the catalog to the Requester Setup page or clear any catalog restrictions for the requestor.

Note. Before running this process, verify the settings for requiring item approval. If you select the Item Approval Required check box on the Installation Options - Overall/GL page, all items that you load require approval. If you are loading thousands of items, you might not want to approve each item individually.

Options

Run Item Load	Select to indicate that you want the system to load catalog items automatically as soon as it runs the CUP load.
Index Items	Select to indicate you want the system to run the Verity indexing process automatically as soon as it runs the CUP load process.
Tree Name	Select the tree name that is used to store the category hierarchy.
Language	Select the language in which the items are to be stored.
Inactive Level	Select the level at which you want to inactivate to make the item not active. Values include the *Item Vendor* or at the *Item Vendor Price* level.
Process Imported Items	Click to access the Validate and Process Imported Items page where you can work with imported items before loading them.

The Run Load process loads the data from the PV_CP_LOAD and PV_CP_CAT_TMP staging tables to the production tables for PeopleSoft items.

The process of loading data includes four steps:

1. The Build PeopleSoft Items process (PV_CP_ITM_LOAD) adds new item categories and then loads Marketplace CUP items into the PO item staging tables (ITM_LOAD_MST_EC, ITM_LOAD_INV_EC, ITM_LOAD_PUR_EC, and ITM_LOAD_VND_EC).

2. The Load Item Stage process (PO_ITMLOAD) transfers the data to the item loader staging tables.

3. The Item Loader process (IN_ITMLOAD) transfers the data into the PeopleSoft production tables.

4. The item status is updated on the CUP Item Status page.

The Load Marketplace Items process also adds certain defaults that were not in Marketplace catalog tables to the required fields of the PeopleSoft Item Master tables. This information is hard coded into the Item Catalog PS_ITM_CAT_TBL table:

Field	Value Inserted
CATEGORY_TYPE	*PSF*
DESCRSHORT	*MKTPLACE*
INSPECT_CD	*N*
INSPECT_UOM_TYPE	*S*
RECV_REQ	*Y*
RJCT_OVER_TOL_FLAG	*N*
REVC_PARTIAL_FLG	*1*
SRC_METHOD	*B*

This information is hard coded into the Item PS_ITM_LOAD_PUR_EC table:

Field	Value Inserted
TAXABLE_CD	*Y*
INSPECT_CD	*N*
INSPECT_UOM_TYPE	*V*
RECV_REQ	*Y*
RJCT_OVER_TOL_FLAG	*N*

Field	Value Inserted
ACCEPT_ALL_VENDOR	*N*
ACCEPT_ALL_SHIPTO	*Y*
CONTRACT_REQ	*N*
RECV_PARTIAL_FLG	*1*
DESCRSHORT	*MKTPLACE*
SRC_METHOD	*B*
ACCEPT_ALL_UOM	*Y*
PRICE_DT_TYPE	*L*
PRICE_CAN_CHANGE	*P*
VNDR_CATALOG_ID	*Y*

See Also

Defining Item Import Defaults

Access the Item Defaults page (eProcurement, Administer Procurement, Maintain Supplier Integration, Import Item Catalog File. Select the Item Defaults tab).

Item Defaults page

Image Folder	Enter the file location that contains images for use with the catalog items that you import.
Inventory Item	Select to indicate this item is also a PeopleSoft Inventory item. This means you can source the item from Inventory.
Account	Select an account to which you want the categories to belong.
Currency	Select the currency to use with this category.

Validating and Processing Imported Items

Use the Validate and Process Imported Items page to review categories and items, to determine the state the items are in, and to load the staged items into the Inventory tables.

Access the Validate and Process Imported Items page (eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items).

Validate and Process Imported Items page

Categories	This link takes you to the Edit Imported Items Categories page.
View Items	This link takes you to the Imported Item Status page.
Load Staged Items	When you have determined that the results are satisfactory, you can load the staged items from the eProcurement staging tables into the Inventory tables.
Delete All	Deletes all pending data from the eProcurement staging table.

See Also

Chapter 5, "Importing and Searching Supplier Catalogs," Validating and Processing Imported Items, page 106

Editing Imported Item Categories

Access the Edit Imported Item Categories page (eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items. Click the Categories link).

Edit Imported Item Categories page

Note. These categories are created from the UN/SPSC codes downloaded from a Marketplace. Add an account to each new category. The account is the top level of the ChartFields (chart of accounts) used to create accounting entries in PeopleSoft. If the CUP file does not create any new item categories, this page does not appear.

Copy   Click to copy the value in the Account field to every row on this page.

Account   Enter the default account for this category. The account is the top level of the PeopleSoft ChartField used to create accounting entries in PeopleSoft. This is a required field.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Defining Procurement Options"

Maintaining Imported Item Statuses

Use the Imported Item Status page to update information for items that are in staging tables. After making the updates, you can load them into PeopleSoft production tables. You can load an item again if its status is *Processing Complete.*

Access the Imported Item Status page (eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items. Click the View Items link).

Imported Item Status

Process Instance: 10092   **Partner Name:** GRAINGER

Item Status: Ready to Build Items

Chunk Size: 100 ◄ ◄◄ ►► ►| **Total:** 319

Imported Item Status

Customize | Find | View All | | | First ◄ 1-10 of 28 ► Last

One | Two | Three | Four | Five

Sequence	Part Number	Extension	UOM	Action
7	1AD83		PK	A
19	1AG64		EA	A
43	1AG24		EA	A
49	1AJ86		PK	A
50	1AJ28		PK	A
52	1AF62		EA	A
54	1AHL1		EA	A
56	1AHK7		EA	A
59	1AHK4		EA	A
64	1AHH9		EA	A

Return

Import Item Status page

Item Status   The current load status of the items in the staging tables. The drop-down list only displays a status if there are currently items in that status. Values include:

Invalid Unit of Measure: Select to display all items with units of measure that are invalid in PeopleSoft eProcurement.

Invalid or Missing Category: Select to display all items that do not have a valid item category.

Invalid or Missing Supplier: Select to display all items that do not include a valid supplier and vendor.

Item to be Updated: Select to display all items that have been previously loaded into PeopleSoft eProcurement and currently need to be updated with new item information.

Price to be Updated: Select to display all items that have been previously loaded into PeopleSoft eProcurement and currently need to be updated with new pricing information.

Ready to Build Items: Select to display all items that are ready to be loaded into the PeopleSoft Item Master tables.

Items to be Inactivated: Select to delete items from the catalog.

Processing Complete: Appears when the item has been entered successfully into the PeopleSoft production tables.

The actions on this page will display either *A* for add, or *D* for delete.

Loading Marketplace Items

Access the Load Item Catalogs page (eProcurement, Administer Procurement, Maintain Supplier Integration, Validate and Process Imported Items. Click the Load Staged Item button).

Load Item Catalogs page

Run Item Load Process	Select to run the Load Item Stage process (PO_ITMLOAD). If this option is not selected, only the first step in this process is completed. You can run this process separately using the Items Price List page. You can run this process separately to verify or change data in the PO Item staging tables.
Run Inbound Items Process	Select to run the Item Loader process (IN_ITMLOAD). This option is only available, if you select the Run Item Load Process check box. You can also run this process separately using the Item Loader page. You can run this process separately to verify or change data in the Item Loader staging tables.
Inventory Item	Select to indicate this item is also a PeopleSoft Inventory item. This means that you can source the item from Inventory.
Update Business Unit Price	Select to update business unit standard prices when an Item and Vendor UOM price record is loaded. This field is available only if *Item Pricelist* is selected in the Item Load Type field. If this is selected, all business units that match the SetID and item combination and that have the Business Unit Update Price check box selected on the BU Specific Attributes page will have the new price applied. Future effective-dated prices do not go into effect until you run the Price Update process on or after the effective date.
Update Standard Price	Select to update standard prices when an Item and Vendor UOM price record is loaded. This field is available only if *Item Pricelist* is selected in the Item Load Type field. Future effective-dated prices won't go into effect until you run the Price Update process on or after the effective date.
Index Items	Select to indicate that you want the system to include the item as part of the Verity indexing process.

Item Image Sub Folder   Enter a location where images for use with item catalogs should be stored.

Note. If errors occur during the Item Loader process, use the Data Definition Maintenance page to review them.

Correcting Inventory Item Load Errors

Access the Data Def Maint page (eProcurement, Administer Procurement, Maintain Supplier Integration, Correct Item Load Erros).

Data Def Maint page

Use this page to review and resolve problems with items.

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook, "Processing Enterprise Integration Points (EIPs)," Using Data Definition Maintenance

Downloading Item Attachments

Any item downloaded could have an item image stored as an attachment. You can download these attachments from a Marketplace. The image of the item appears on the Search Catalog - Item Description page and the Requisition Summary - Item Description page.

To download item attachments from a Marketplace into PeopleSoft eProcurement:

1. Run the Export CUP Data process to create the attachment file from a CUP file.

   This file does not contain the actual attachments (item images), just the file names and extensions of each attachment. The actual attachments are downloaded in a separate step. This attachment file cross-references the names and extensions of each attachment to the corresponding item ID.

   Note. In order to create an attachment file from the Export CUP Data process, a product file must be created at the same time from the same CUP file.

2. Run the Import CUP File process to move the data in the attachment file into the eProcurement cross-reference table, PV_CP_ITM_XREF.

   Note. Other attachments—aside from images—can be downloaded from a Marketplace. Only attachments with a P (picture) type are loaded into the eProcurement cross-reference table, PV_CP_ITM_XREF, when the Import CUP File process runs. All other attachments are loaded into the PV_CP_ATTACH file for future use.

3. Define the location where the item attachments should be stored using:

   a. The File Location page, which defines the first part of the directory and extension of the attachments.

   b. The Load Marketplace Items process, which defines the subdirectory.

      For example, if the item attachments that you are downloading are GIF images, the File Locations page defines the file extension (GIF) and the file directory F:\User\Images\. If you enter *MktPlc items* in the Item Image Sub Directory field of the Load Marketplace Items page, the attachments with the extension GIF are stored in the directory: F:\User\Imagesl\MktPlc items.

4. Download the zipped file containing the item attachments from a Marketplace.

   Place these item attachments in the directory location defined in step 3.

See Also

Using Price and Availability Check

During requisition entry, you can update the price of an item with the most current price in a Marketplace. Click the Check Price and Availability button on the Requisition Summary - Item Description page. If the supplier's price in a Marketplace is the same as the price in the item tables, there is no change to the page. If the supplier's price is different, a message appears which informs you that the price is changing to the supplier's price. The Item Description page then displays the Marketplace price.

Use the Check Price and Availability function to also compare the supplier's available quantity in a Marketplace to the requisition quantity. If the quantity requested exceeds the available quantity, a message appears which provides the opportunity for you to change the requisition quantity.

Note. The Check Price and Availability button only appears if this is a Marketplace item that is loaded from a CUP file, and the user has been assigned the eProcurement role action of PRICEANDAVAILCHECK.

Integrating PeopleSoft eProcurement Transactions with a Marketplace

This section provides an overview of transaction integration and discusses how to:

- Use the Marketplace Registration Wizard.

- Test the transactional Marketplace integration.

- Move from a test environment to the production environment.

- Prepare to use Marketplace catalog search.

- Receive a purchase order acknowledgement.

Understanding Transaction Integration

This overview discusses:

- Marketplace catalog search integration.

- Receipt of Purchase Order Acknowledgements from a Marketplace.

- Receipt of an Advanced Shipment Notification (ASN).

- Receipt of an Invoice.

Marketplace Catalog Search Integration

The Marketplace catalog search is an application that hosts multiple supplier catalogs within the Marketplace.

This diagram illustrates an overview of Marketplace catalog search launched by an PeopleSoft eProcurement user. The user is transferred to the MarketPlace Catalog Search where they can search the aggregated supplier catalog and return results to the shopping cart within PeopleSoft eProcurement:
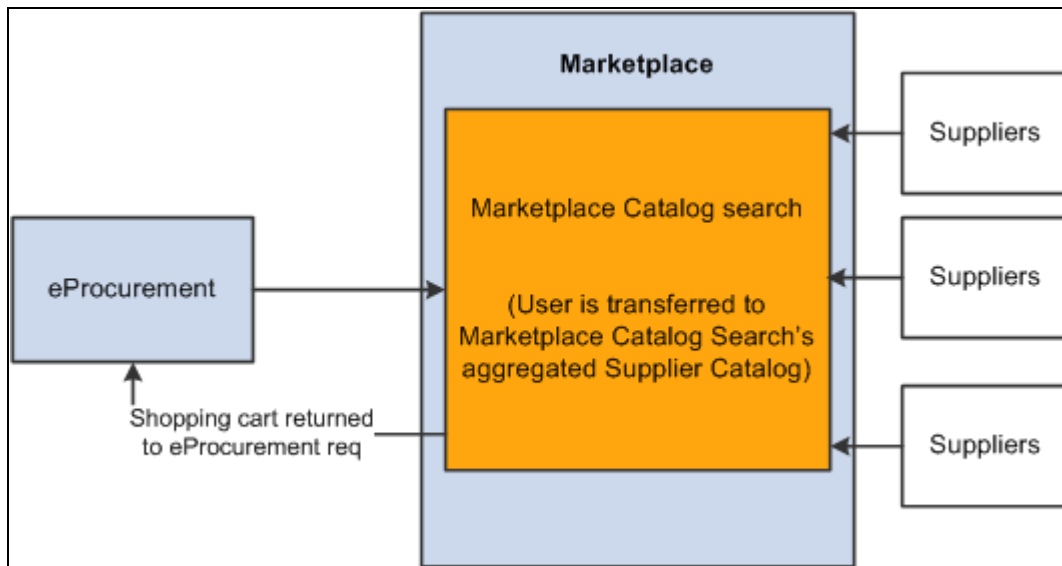
Marketplace Catalog Search by a user withing PeopleSoft eProcurement

To set up and use the Marketplace catalog search, you must:

1. Set up security that enables requesters to move from the eProcurement requisition into the Marketplace.

2. Create vendor profiles and vendor locations, and link the properties of that vendor to the information that creates a link to a Marketplace.

   Note. Upon completion of this set up, a link will be provided on the eProcurement requisition. Selecting this link directs the requester to the Marketplace site.

3. Set up background details that determine which vendor catalogs that the requester can view.

   The Marketplace validates the requester security and displays the catalogs that the requester can view. The requester selects catalog items and returns to the requisition. The system populates the selected items as requisition lines.

Receipt of Purchase Order Acknowledgements from a Marketplace

The purchase order acknowledgement (POA) is a collaboration between the supplier, the Marketplace, and the PeopleSoft application. To create and transmit a POA these steps must occur:

1. Once the purchase order has been dispatched from PeopleSoft, the supplier logs into the Marketplace and finds that the purchase order is available in a queue for that specific supplier. From the Marketplace the suppliers can initiate a POA document.

2. The Marketplace then transmits xCBL formatted POA to PeopleSoft where it is transformed to the PeopleSoft internal format PSXML.

3. The inbound message populates the PO Electronic Commerce tables.

4. If the POA results in changes, a change order may be generated.

This diagram represents the flow of the POA from the Marketplace as defined in the above steps:
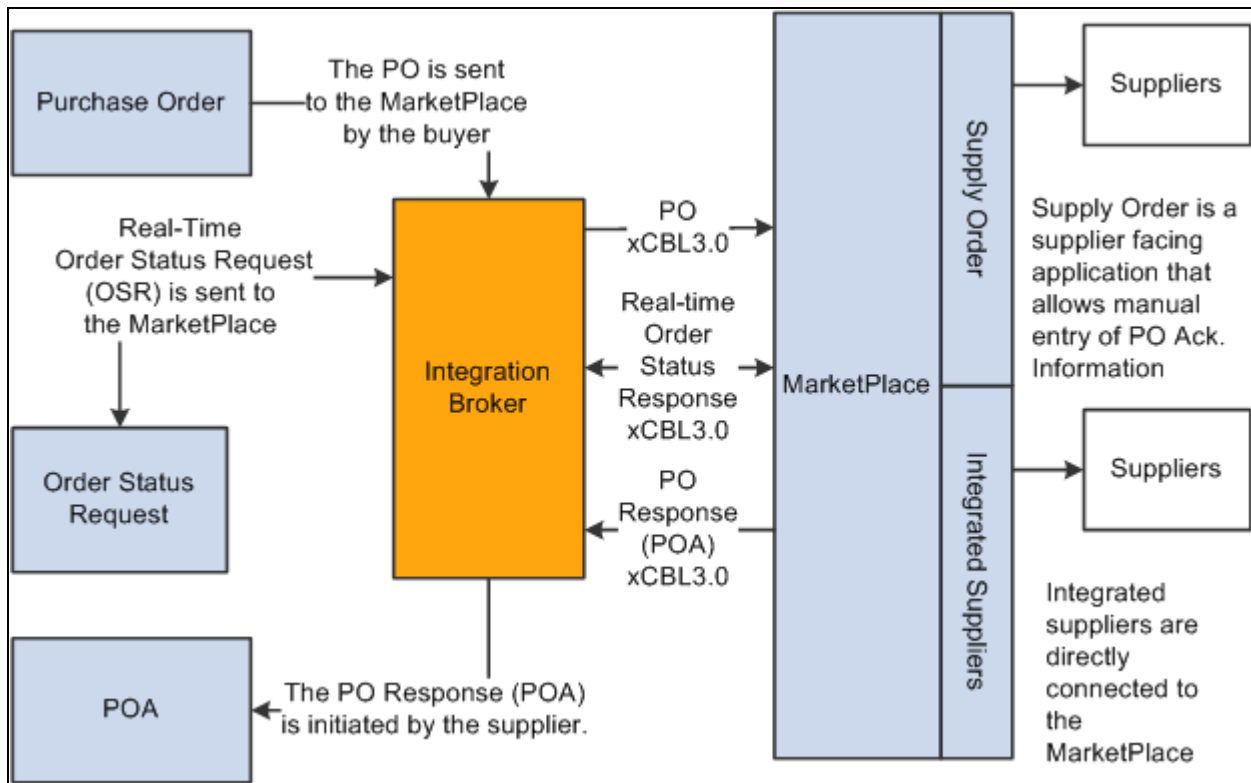
Purchase Order Acknowledgement generated in Marketplace after receipt of a purchase order from PeopleSoft eProcurement.

Note. The POA is mapped to a line, not to a schedule within the Marketplace. Only one schedule is allowed within Marketplace POA integration.

Note. The Notes to Buyer from the Marketplace are not mapped into the PeopleSoft system.

There are two options for receiving a purchase order acknowledgement from the supplier. The first is a *POA* which uses the PeopleSoft Purchasing functionality, and stores the status within Purchasing tables. The second is the *POR* (purchase order response) where you can view the status from the PO Dispatch Message page. eProcurement, Buyer Center, Dispatch Purchase Order, Dispatch Message Log.

Receipt of an Advanced Shipment Notification (ASN)

The supplier uses the advanced shipping receipt (ASR) enterprise integration point (EIP) to notify the PeopleSoft system that the order has been fulfilled. To complete the integration, these steps must occur:

1. A supplier is able to enter advanced shipping notifications (ASNs) within the Marketplace site.

2. Once submitted, Integration Broker transforms this data to the PeopleSoft inbound ASR message using the Advanced Shipping Receipt (ADVANCED_SHIPPING_RECEIPT) service operation in PeopleSoft.

3. The message populates the Receipt Load tables.

4. The Receipt Loader process is then executed to create a receipt, which may then be approved by an administrator.

This diagram represents the flow of the supplier-entered ASN from the Marketplace as defined in the above steps:
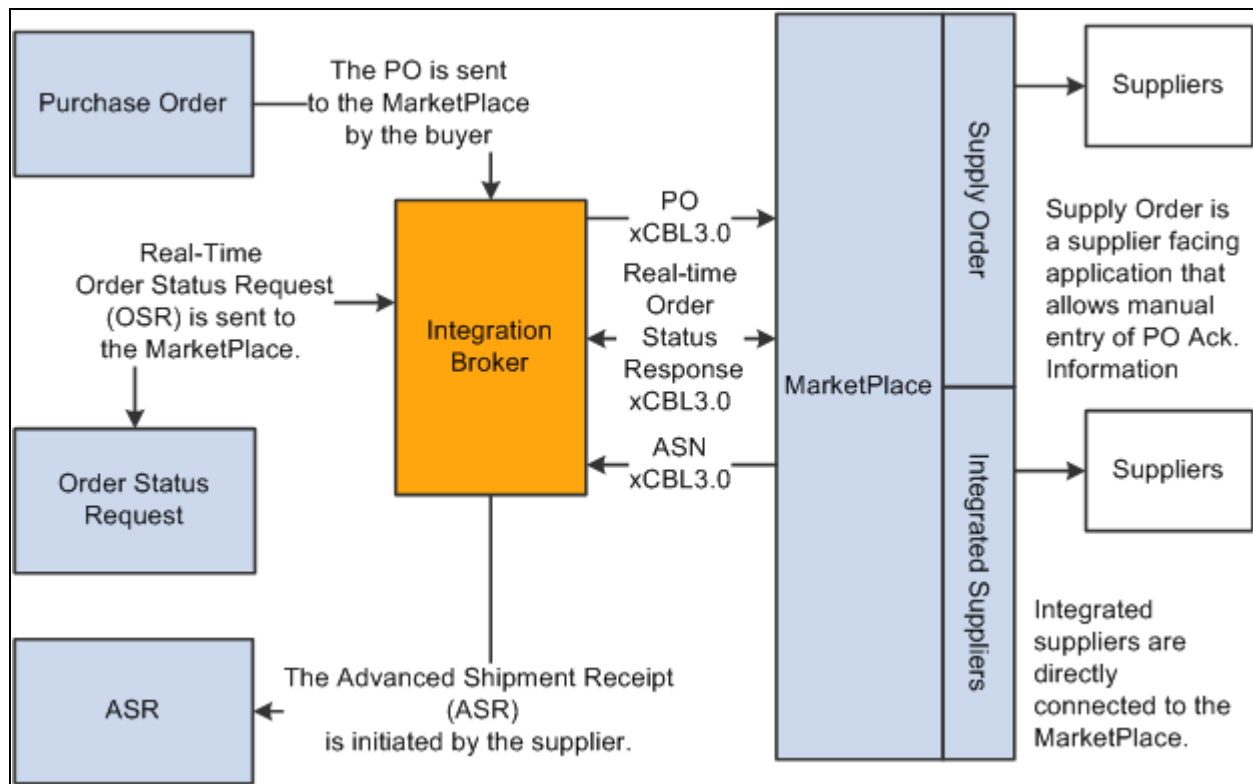
Advanced Shipping Receipt (ASR) generated in Marketplace after receipt of a purchase order from PeopleSoft eProcurement.

Receipt of an Invoice

When an integrated supplier creates and invoice and sends it to the Marketplace, or an invoice is created, the Marketplace sends the invoice to the Integration Broker. Integration Broker then transforms the invoice from xCBL 3.0 to the PeopleSoft inbound XML invoice message.

From the Integration Broker, the Marketplace partner ID (MPID) that is passed from the Marketplace is used to look up the vendor ID field using the Linked Supplier table. The vendor SetID and vendor ID are retrieved based upon this information.

Once the vendor ID is established, the invoice is loaded to the voucher staging tables.

When the data is in the staging tables, these steps take place:

1. Voucher build is executed.

2. Voucher is created.

3. Matching may be run if the voucher has an associated purchase order or receipt.

4. Paycycle process creates a payment.

This diagram represents the flow of an invoice from the Marketplace as defined in the above steps:
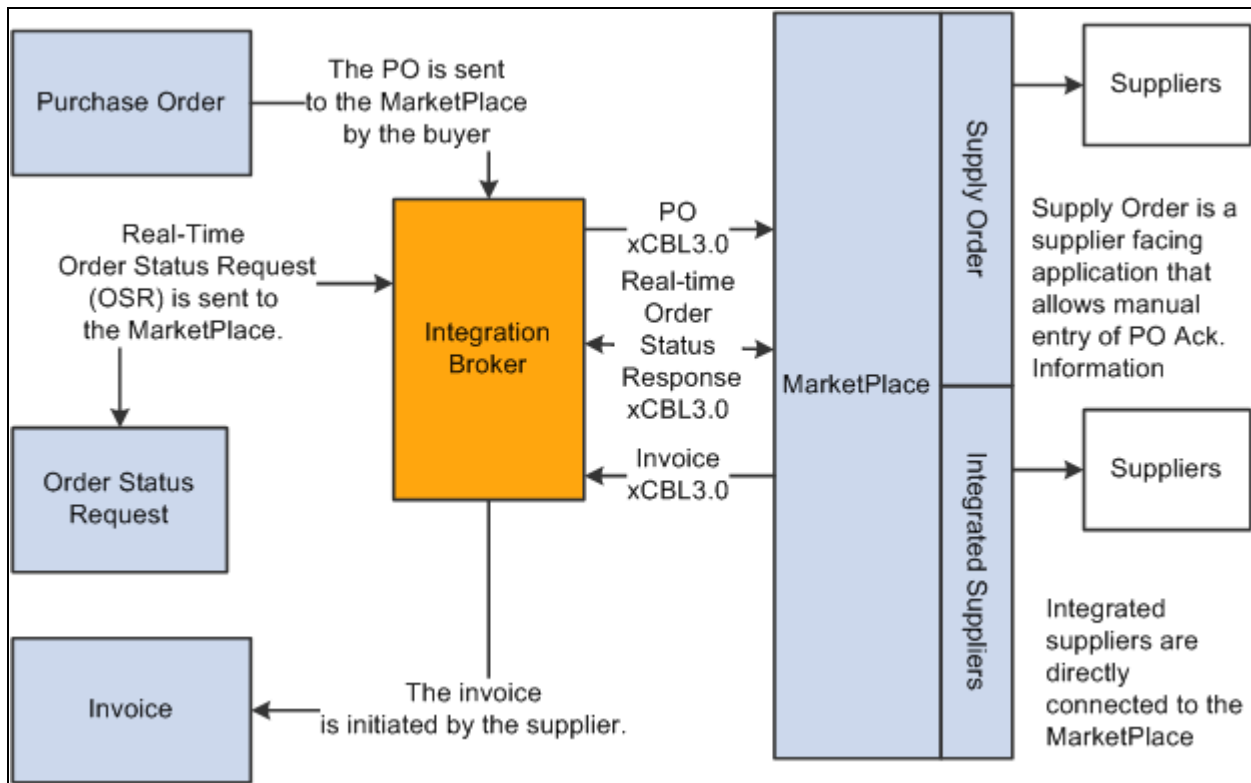
Invoice Transactions generated in Marketplace after receipt of a purchase order from PeopleSoft eProcurement.

Note. The Marketplace invoice integration is not supported if PeopleSoft eSettlements is active.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Pages Used to Integrate PeopleSoft eProcurement Transactions with a Marketplace

Page Name	Definition Name	Navigation	Usage
Administer Procurement	PV_ADM_MAIN	eProcurement, Administer Procurement, Administer Procurement	Access other procurement administration pages. This page consists entirely of links to other pages.
Maintain Supplier Integration	PV_ADM_MARKETSITE	Click the Maintain Supplier Integration link on the Administer Procurement page.	Access supplier integration pages. This page consists entirely of links to other pages.

Page Name	Definition Name	Navigation	Usage
Maintain Vendors	PV_ADM_VNDR	Click the Maintain Vendors link on the Administer Procurement page.	Access vendor-related pages. This page consists entirely of links to other pages.
Maintain Business Units	PV_ADM_SETUP_BU	Click the Maintain Vendors link on the Administer Procurement page.	Access business unit-related pages. This page consists entirely of links to other pages.
Marketplace Test	SAC_MP_VERIFY	Click the Marketplace Test link on the Maintain Supplier Integration page.	Use this page to verify that PeopleSoft eProcurement and the Marketplace are communicating.
Vendor Information - Summary	VNDR_ID1_SUM	Click the Vendor Information link on the Maintain Vendors page.	This is the first page of the component where you create vendor records.
Linked Suppliers	PV_MS_SEC_SUPPLIER	Click the Linked Suppliers link on the Maintain Supplier Integration page.	Use the Link Suppliers page to tie Direct Connect and Marketplace supplier information to a vendor.
Supplier Properties	PV_MS_SEC_SUP_NV	Click the Supplier Properties tab from the Linked Suppliers page.	Use the Supplier Properties page to identify information for the specific supplier location.
Marketplace Registration Wizard	SAC_MP_COMPANY	Click the Marketplace Registration link on the Maintain Supplier Integration page.	Set up the company's registration with the Marketplace.
Marketplace Buyer Setup	PV_MS_SEC_BUYER	eProcurement, Administer Procurement, Maintain Supplier Integration, Marketplace Buyer	Use the Marketplace buyer page to define the URL the system uses when contacting the Marketplace. See Chapter 8, "Integrating with a Marketplace," Pages Used to Set Up Marketplace Suppliers and Buyers, page 160.
eProcurement Business Unit Options	PV_BUS_UNIT_PM	Click the eProcurement Business Unit Options link on the Maintain Business Units page.	Configure the business unit to display the PO acknowledgements button and the advanced shipment notification (ASN) button.

Page Name	Definition Name	Navigation	Usage
Define Static Maps	SAC_MAP_VALUE_ONLY	Click the Integration Data Value Mappings link on the Maintain Supplier Integration page.	Enter details that tell the system how to read data coming from the outside source and what value to use in the PeopleSoft format.

Using the Marketplace Registration Wizard

Access the Marketplace Registration Wizard page (Click the Marketplace Registration link on the Maintain Supplier Integration page).

The wizard will guide you to enter this information prior to submitting the registration:

• Company information.

• Company Contacts.

• Gateway Information.

Company Information — Marketplace Registration Wizard

Enter the company information including the User ID and Password to use when logging onto the Marketplace.

Enter the Gateway production and test URL.

See Chapter 8, "Integrating with a Marketplace," Testing the Transactional Marketplace Integration, page 197 and Chapter 8, "Integrating with a Marketplace," Moving From a Test Environment to the Production Environment, page 198.

Testing the Transactional Marketplace Integration

Access the Marketplace Test page (Click the Marketplace Test link on the Maintain Supplier Integration page).

Prior to using the production environment, you should elect to submit a test. This test verifies that PeopleSoft eProcurement is communicating with the Marketplace test environment by sending a predefined purchase order with a predefined test supplier. the purchase order will be a generic, non-configurable, purchase order. It will only be used to test the connectivity, it will not be fulfilled.

Moving From a Test Environment to the Production Environment

Once you have successfully tested the PeopleSoft test environment, the administrator performs these tasks to move the buyer setup data into the production database:

1. Login to data mover for source and test database.

2. Marketplace script *upd304852_01.dms*to export relevant Marketplace definitions:

   • Marketplace buyer.

   • Marketplace registration information.

3. Login to data mover for target and production database.

4. Marketplace script *upd304852_02.dms*to import relevant Marketplace definitions:

   • Marketplace buyer.

   • Marketplace registration information.

5. When you are ready for production, navigate to the Marketplace buyer page and change the URL to the Marketplace production URL.

Preparing to Use Marketplace Catalog Search

Before you begin using Marketplace catalog search, you must create a link to the Marketplace. This link will appear on the requisition for users to access the supplier catalogs:

1. Create a generic vendor profile for the Marketplace that is then tied to a link supplier configuration. This combination is used to link to the Marketplace web site to the requisition.

2. Set up logins for each location and register each within the Marketplace.

3. Create a vendor profile for each supplier the company does business with.

4. Associate each vendor location with its individual linked supplier; this includes all vendor locations for the Marketplace vendor profile.

5. Create a node for each login ID that is passed from eProcurement to the Marketplace.

Setting up Vendor Profiles

Access the Vendor Information - Summary page (eProcurement, Administer Procurement, Maintain Vendors, Vendor Information).

To enable the Marketplace integration you must complete these tasks:

1. Create a vendor profile for the Marketplace.

2. Create vendor locations for every login ID you have with the Marketplace.

3. Create vendor profiles for each supplier you do business with within the Marketplace.

4. Create link supplier identifiers for each vendor location.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."

Using Rule Based Catalogs with the Marketplace

Rule based catalogs are a form of security within PeopleSoft eProcurement. As an administrator you have the option of allowing requesters visibility of catalogs, as well as the links to the direct connect suppliers, based on the criteria you define within the catalog security. The Marketplace is considered a direct connect supplier in this case. You can determine requester access based on role, business unit, or a specific requester ID. Think of each Marketplace catalog search link as a different catalog. Use rule based catalogs to aid in determining which catalogs requesters are capable of viewing upon login to the Marketplace.

See Chapter 5, "Importing and Searching Supplier Catalogs," Understanding Catalog Security, page 109.

Receiving a Purchase Order Acknowledgement

Access the Define Static Maps page (Click the Integration Data Value Mappings link on the Maintain Supplier Integration page).

Define Static Maps page

PeopleSoft is delivered with POA statuses mapped from the Marketplace header and line formats. If you add a new status in the Marketplace, you can add the mapping to the PeopleSoft status codes.

These are the POA header status mappings:

Marketplace Value	xCBL 3.0 Value	PeopleSoft Value (ACK_Status)
Accepted	Accepted	AT (Accepted)
Accepted with Changes	AcceptedWithAmendment	IC (Accepted with Changes)
Cancelled	NotAccepted	RD (Rejected)
Completed	AcceptedWithAmendment	IC (Accepted with Changes)
Not Accepted	NotAccepted	RD (Rejected)
Other	AcceptedWithAmendment	IC (Accepted with Changes)
Payment Required	AcceptedWithAmendment	IC (Accepted with Changes)
Processing	AcceptedWithAmendment	IC (Accepted with Changes)
All Other Statuses	All Other Statuses	ZZ (mutually defined)

The POA line status mappings options are:

Marketplace Value	xCBL 3.0 Value	PeopleSoft Value (ACK_Status)
Accepted	ItemAccepted	AT (Accepted)
Accepted with Changes	AcceptedWithAmendment	IC (Accepted with Changes)
Cancelled	NotAccepted	RD (Rejected)
Completed	AllreadyDelivered	IC (Accepted with Changes)
Not Accepted	ItemNotAcceptedByTheSeller	RD (Rejected)
Other	AcknowledgeWithDetailAndChange	IC (Accepted with Changes)
PrePayment Required	Other	ZZ (mutually defined)
Processing	Pending	ZZ (mutually defined)
All Other Statuses	All Other Statuses	ZZ (mutually defined)

See Also

Chapter 9

Integrating with Direct Connect Suppliers

This chapter provides an overview of direct connect supplier integration and discusses how to:

- Set up direct connect.

- Connect to suppliers using PunchOut.

- Connect to suppliers using RoundTrip.

- Troubleshoot error messages.

Understanding Direct Connect Supplier Integration

This section discusses:

- Direct connect.

- Shared data synchronization.

Direct Connect

Direct connect enables PeopleSoft eProcurement requisition users to interact directly with a supplier's website. This interaction enables the user to browse and search the supplier's online catalog to select items to add back into the eProcurement requisition using an approved standard process such as PunchOut (Ariba's standard) or RoundTrip and OCI (Commerce One's standard.)

You set up direct connect methods and supplier details, such as URLs (uniformed resource locator). You then run through a series of background processes. eProcurement:

- Passes and receives strings of data which are transformed from XML into PeopleSoft service operations.

- Makes it possible for users to access and browse supplier catalogs.

- Adds requisition lines using supplier shopping carts.

- Sources purchase orders (POs) to suppliers.

The product or service items that you select are brought into a eProcurement requisition, which is processed through the approval workflow. The requisition is eventually converted to a purchase order, which can be routed to the supplier's website. This integration enables you to access multiple vendor catalogs in real-time, without loading or maintaining catalogs within PeopleSoft applications, including eProcurement.

Direct connect supplier integration enables you to create configured orders for products or services such as:

- Computer systems with various types of processors, memory requirements, and peripherals.

- Printing jobs with varying text, colors, types and sizes of paper, numbers of copies, and output formats.

- Catered events with different locations, times, types of food, and levels of service.

PeopleSoft eProcurement supports:

- RoundTrip integration that uses OCI (Open Catalog Interface) to format the data returned from the shopping session.

- PunchOut integration that uses cXML.

- RoundTrip to marketplace.

- PunchOut to Exchange.Oracle.com

Note. Using either RoundTrip or PunchOut, you can access a supplier's existing, web-based catalog from within eProcurement. You can add goods and services to a shopping cart, which is sent back to eProcurement for order fulfillment. You can access supplier catalogs and streamline the purchasing processes.

Note. The Direct Connect Supplier feature requires some set up by the organization. The steps for entering an order with a direct connect supplier vary according to the supplier and the set up. Because direct connect order processing involves integration with another website, the eProcurement change request feature might not be available for purchase orders that are created in this manner.

Note. The terms marketplace and marketsite are interchangeable in this PeopleBook and refer to conducting business using the internet.

Viewing and Editing Requisition Line Items

In addition to connecting to a supplier website to add new requisition line items, Direct Connect also supports the connection to the supplier's site to view and edit item details for items that have been added to a requisition using Direct Connect. This is accomplished by using the Description link on a requisition line. The Description link is available from many pages, and can be used for either viewing the item details or editing item information, such as quantity.

In order to accomplish this, the supplier must be set up with the ability to view and edit items, which is specified on the Supplier Properties page. If the supplier supports items to be viewed and edited, then the application connects to the supplier site and lets the site know whether the user is editing the line or viewing line details. Therefore, in addition to the supplier setup, there is one rule that eProcurement follows in order to determine which behavior (view or edit) to specify to the supplier. If the item Description link is in the Create Requisition component, such as the Submit Requisition page, then the user is able to edit the information on the supplier site. All other item description links, such as the links in the Manage Requisition component, are view only.

Note. In the RoundTrip standard, view mode is the only mode supported. Additionally, in the cXML and PunchOut specification, view mode is known as inspect mode.

Using Direct Connect Items on Favorites List or Templates

Items entered on a requisition using the direct connect method can also be saved as favorites or as items on a template. These methods save the requester time when creating additional requisitions for the same item. If you do not want this functionality for your requesters, you can deselect the check box, Allow Saving Direct Connect Items in Favorites and Templates, on the eProcurement Installation Options page.

Shared Data Synchronization

To prevent validation errors when requisition information is passed between eProcurement and the direct connect supplier's website, the common control data should use these codes:

Control Data	*Standard Used by cXML*
Units of measure	UN/CEFACT
Currency codes	ISO 4127
Country codes	ISO 3166
Language codes	ISO 639

Setting Up Direct Connect

To set up direct connect, use the Direct Connect Methods (PV_DC_TYPE), and the Supplier Value Cross-Reference (PV_MERCHANT_XREF) components.

This section discusses how to:

• Set up direct connect suppliers.

• Activate the direct connect service operation.

• Set up a node.

• Set up node connectors.

• Set up a routing.

• Set up routing parameters.

• Define favorites and templates feature.

- Set up a linked supplier.

- Set up supplier properties.

- Map field values.

Pages Used to Set Up Direct Connect

Page Name	Definition Name	Navigation	Usage
Direct Connect Methods	PV_DC_TYPE	eProcurement, Administer Procurement, Maintain Supplier Integration, Direct Connect Methods	Define Direct Connect integration methods and standards
Vendor Information-Summary	VNDR_ID1_SUM	eProcurement, Administer Procurement, Maintain Vendors, Vendor Information	Create new vendor profiles. See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."
Node Definitions	IB_NODE	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Node Definitions • PeopleTools, Integration Broker, Integration Setup, Nodes	Create a node for each linked supplier that you utilize with direct connect.
Connectors	IB_NODECONN	• eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Node Definitions Click the Connectors tab. • PeopleTools, Integration Broker, Integration Setup, Nodes Click the Connectors tab.	Set up node connectors that represent the direct connect node. This page enables you to associate gateways and connectors to a node.

Page Name	Definition Name	Navigation	Usage
Routing Definitions	IB_ROUTINGDEFN	- eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions - PeopleTools, Integration Broker, Integration Setup, Routings	Set up a routing that is associated with the direct connect node.

Parameters	IB_ROUTINGDEFNDOC	- eProcurement, Administer Procurement, Maintain Supplier Integration, Integration Broker Routing Definitions
		
		  Click the Parameters tab.
		
		- PeopleTools, Integration Broker, Integration Setup, Routings
		
		  Click the Parameters tab.
			Set up routing parameters.

eProcurement Installation Options	PV_INSTALLATION_PV	eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options	Set up PeopleSoft eProcurement installation options, including the option to save direct connect items as favorites and templates.
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers, Linked Suppliers	Associate vendor ID, vendor location, and the direct connect node together. See Chapter 3, "Determining Technical Implementation Options," Using the Linked Suppliers page, page 46.

Page Name	Definition Name	Navigation	Usage
Supplier Properties	PV_MS_SEC_SUP_NV	Select the Supplier Properties tab from the Linked Suppliers page.	Set up supplier properties, which determines how the supplier interacts with the direct connect method. See Chapter 3, "Determining Technical Implementation Options," Setting Up Supplier Properties, page 52.
Supplier Value Cross-Reference	PV_MERCHANT_XREF	eProcurement, Administer Procurement, Maintain Supplier Integration, Supplier Value Cross-Reference	Map field values between supplier fields and your fields by creating a cross-reference between the item categories and the values that are returned by PunchOut direct connect suppliers.

Defining the Direct Connect Methods page

Access the Direct Connect Methods page (eProcurement, Administer Procurement, Maintain Supplier Integration, Direct Connect Methods).

Direct Connect Methods page

Direct Connect Method   Identifies the type of connection to the supplier's website. Delivered options
include:

- EXCH_ORACLE: to access the Exchange.oracle.com website

- PUNCHOUT: to access a vendor's website using cXML

- ROUNDTRIP: to access a vendor's website using OCI (Open Catalog
  Interface).

- ROUNDTRIP_MP: to access marketplace using roundtrip.

Root Package ID	Identifies the PeopleSoft application package used for this direct connect method.
Application Class Path	Identifies the PeopleSoft application class within the above application package.
Properties	Lists property values that the system uses for this direct connect method.

Setting Up Direct Connect Suppliers

There are several tasks that need to be completed before a vendor is enabled for direct connect.

1. Exchange contact information with the supplier.

2. Execute contractual agreements that are required between the supplier and your organization.

3. Set up the direct connect supplier as a PeopleSoft vendor.

    See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."

4. Activate the direct connect service operation.

    See

5. Create a node for the supplier that you will connect to.

    See

6. Set up a routing that represents the direct connect supplier.

    See

7. Define the favorites and templates feature on the eProcurement Installation Options page.

    See

8. Set up the supplier as a link supplier .

Obtaining Authentication From the Supplier

These steps describe the setup for direct connect suppliers:

1. The supplier creates an account for your organization.

2. Your organization's administrator and the supplier establish an organization wide password (shared secret) that authenticates XML service operations from eProcurement.

3. The supplier provides your organization with a URL, which is used when setting up the Vendor Information page.

Creating a Vendor Profile

If the supplier is not already a vendor, you need to create it. These are the fields for use when creating a linked supplier definition:

- Vendor SetID.

- Vendor ID.

- Vendor Location.

Note. Before you save an eProcurement requisition, you must first establish the supplier as a PeopleSoft vendor. After you establish the supplier as a vendor, the vendor ID is saved on the requisition line. When the requisition is converted to a purchase order, the supplier is listed as the vendor on the purchase order.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."

Activating The Direct Connect Service Operation

The direct connect service operation (PV_DC_CONNECT_REQST) enables eProcurement to interact with direct connect suppliers, allowing eProcurement users to browse, search, and select items from supplier catalogs. Items from the supplier catalogs are then added to the eProcurement requisition. XML based documents are passed between eProcurement and the supplier to authenticate and sign the user onto the supplier's website, and to transfer the ordered items back to eProcurement.

PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM.

To setup this service operation use the information in this table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.1 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

Service Operation	*Direction and Type*	*Handlers*	*Chunking Available?*	*Integrates With*
PV_DC_CONNECT_REQST	Outbound Synchronous		No	third-party system

See Also

PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook, "Implementing Integrations," Setting Up Service Operations

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Setting Up a Node

Access the Node Definitions page (PeopleTools, Integration Broker, Integration Setup, Nodes).

This node represents the direct connect supplier.

Within the sample data delivered with the system, the PSFT_EXCH_ORACLE node is designed for access to the Exchange.oracle.com website.

Enter this field value, which is specific to Direct Connect Suppliers:

Node Type   Select *External.*

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Adding and Configuring Nodes"*

Setting Up Node Connectors

Access the Connectors page (PeopleTools, Integration Broker, Integration Setup, Nodes, Connectors) and follow these steps:

Enter these field values that are specific to eProcurement:

Gateway ID   Select the gateway ID that represents your local gateway.

Connector ID   Select *HTTPTARGET*

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Adding and Configuring Nodes"*

Setting Up a Routing

Access the Routing Definitions page (PeopleTools, Integration Broker, Integration Setup, Routings) and follow these steps:

There are two routings that are delivered with in the sample data for direct connect; the PV_DC_CONNECT_REQST routing can be altered to connect to a supplier's website, and the EXCH_ORACLE routing is designed to connect to the Exchange.oracle.com website.

Enter these field values that are specific to eProcurement:

Routing Name   Add a routing name that represents the direct connect supplier. It is suggested that you keep this value the same as the Node Name for the direct connect supplier.

Service Operation   Enter *PV_DC_CONNECT_REQST*.

Sender Node   Enter the default local node. The default local node represents who is sending the request.

| **Receiver Node** | Enter the direct connect supplier node. |
| **Object Owner ID field** | Select *eProcurement*. |

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Routing Definitions"*

Setting Up Routing Parameters

Access the Parameters page (PeopleTools, Integration Broker, Integration Setup, Routings, Parameters).

Enter these field values that are specific to the routing definition PV_DC_CONNECT_REQST or EXCH_ORACLE for eProcurement Direct Connect:

Inbound Response Type

External Alias	Enter *PV_DC_CONNECT_RESP* for the routing definition PV_DC_CONNECT_REQST.
	For the routing definition EXCH_ORACLE use the same value as the outbound request.
Message.Ver into Transform 1	Enter *PV_DC_CONNECT_RESP.VERSION_1* for the routing definition PV_DC_CONNECT_REQST.
	For the routing definition EXCH_ORACLE use the same value as the outbound request.
Transform Program 1	Enter *PV_DC_POSRSP* for the routing definition PV_DC_CONNECT_REQST.
	Enter *PV_RSP_EXCH* for the routing definition EXCH_ORACLE.
Message.Ver out of Transforms	Enter *PV_DC_CONNECT_RESP.VERSION_1*.
	For the routing definition EXCH_ORACLE use the same value as the outbound request.

Outbound Request Type

External Alias	Enter *PV_DC_CONNECT_REQST*.
Message.Ver into Transform 1	Enter *PV_DC_CONNECT_REQST.VERSION_1*.
Transform Program 1	Enter *PV_DC_POSR.* for the routing definition PV_DC_CONNECT_REQST.
	Enter *PV_POSR_EXCH.* for the routing definition EXCH_ORACLE.
Message.Ver out of Transforms	Enter *PV_DC_CONNECT_REQST.VERSION_1*.

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Managing Routing Definitions"*

Define the Favorites and Templates Feature

Access the eProcurement Installation Options page (eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options).

eProcurement Installation Options page

Allow Saving Direct Connect Items in Favorites and Templates	Select this check box to allow direct connect items to be saved as favorites or as items on a template. This method saves the requester time when creating additional requisitions for the same item.
	Deselect this check box to prevent direct connect items from being added as favorites or template items. Each time the direct connect item is ordered, the requester must use the Web page of the Create Requisition component to access the supplier's online catalog, select the item, and then return to the eProcurement requisition.

Mapping Field Values

Access the Supplier Value Cross-Reference page (eProcurement, Administer Procurement, Maintain Supplier Integration, Supplier Value Cross-Reference).

When using direct connect, there are times that the data sent by the supplier needs to be translated to the desired data value for the PeopleSoft database. Use this page to map PeopleSoft eProcurement values to values with the same meaning but with different field names that the supplier uses. The most common use of this mapping is when a unit of measure, such as dozen is described by PeopleSoft as DZ and the supplier as DOZ.

There are several fields that might need to have some translation, or mapping, done. These fields may include:

* Unit of Measure

* Currency code

* Country Code

* Category ID

* Vendor ID

Translation always occurs after the item data is received from the supplier and transformed into the PV_DC_ITEMS (Direct Connect Items) message format. On each line of this message, every field in the PV_DC_REQ_LINE (Direct Connect Requisition Line) record is examined to determine if translation is required. The system then queries the data within the Supplier Values Cross-Reference page to determine if the field name and value passed need translation. If the system finds translation is needed, the field is updated with the corresponding PeopleSoft Value.

If no data is sent by the supplier for a particular field, you can assign default values. These values are configured on the Supplier Properties page.

The system uses values that you define on this page both for sending and receiving direct connect supplier data. You can add or change the cross references. Before you access this page, you first select the field to which the mapping applies.

Supplier ID	Select the supplier node for which this mapping is to apply.
Supplier Value	Enter the value that the supplier uses to describe this field.
PeopleSoft Value	Enter the value that PeopleSoft uses instead of the direct connect supplier value.
Vendor SetID, Vendor ID and **Vendor Location**	Select the values for the vendor that you want the system to use when a supplier sends data to PeopleSoft eProcurement.

Setting up a Category Cross-Reference

Category cross-references have their own process. The system goes through these steps to translate a category ID value that is sent by a supplier:

1. The system looks up the Category field in the Item Category table to determine if any category codes match the value sent by the supplier.

2. If the value sent by the supplier is not matched, then the supplier cross reference data is queried to determine if there is a matching category ID for this supplier.

3. If the supplier value cross reference does not contain the category either, the default value is taken from the linked supplier properties.

Setting Up a Vendor Cross-Reference

There are times when the supplier is a marketplace and they broker items from many vendors. The result of this scenario is a different vendor ID for each item is provided by the supplier. When this happens, the supplier sends only one field value to identify the vendor for the item using direct connect. There are three keys that identify the vendor within PeopleSoft:

•   Vendor SetID

•   Vendor ID

•   Vendor Location

The Supplier Value Cross-Reference page is used to store the mappings from the supplier's value to the three PeopleSoft values.

The system goes through these steps to match vendor IDs for the supplier:

1. The supplier value cross-reference data is queried to determine if there is a matching vendor ID for this supplier.

    If there is a match, then, instead of using the PeopleSoft Value, all three vendor keys are placed into the PV_DC_ITEMS service operation.

2. If no match is found, then the three vendor keys that are specified as default values in the linked supplier properties are placed into the PV_DC_ITEMS service operation.

Connecting to Suppliers Using PunchOut

This section provides an overview of definitions and relationships and discusses how to:

•   Define linked suppliers for PunchOut.

•   Define linked suppliers properties for PunchOut.

Overview of Definitions and Relationships

This section discusses:

•   Integration Broker definitions and relationships.

•   Direct connect supplier transformations.

•   Process flow for direct connect supplier integration using PunchOut.

Integration Broker definitions and relationships

Using broker definitions and relationships, you define the parameters for communicating with external suppliers using PunchOut. eProcurement requires at least one local gateway through which it can send and receive service operations.

You set up suppliers as a node in the integration profile. Nodes are locations from which the system sends or receives service operations. Nodes can also be an application, a database, or a server. Multiple nodes can share the same local gateway, which might be the only gateway you will need for all integrations. When a node is linked to a particular service operation, the relationship is called a routing.

A relationship reconciles incompatible parameters to transmit data successfully from the source to the target. Each integration requires at least one routing at each PeopleSoft Integration Broker node. One node uses a routing to send a message, and one or more nodes use routings to receive the message. The sending node might apply a routing with different parameters than those applied by the nodes that receive the message, with respect to routing, transmission type, message structure, or message content.

Direct Connect Supplier Transformations

Before defining direct connect supplier relationships, you need to create transformations. They convert an XML document from one format to another. Since the transformation is associated with a relationship, there can be a separate transformation for each supplier relationship. The system creates transformations using the Application Engine definition.

The system uses a step type of XSLT along with PeopleCode steps to perform the transformation. XSLT documents are tools that hold the structure of a document, as well as the rules of how to transform a XML document from one format to another.

There should be at least one transformation for each message. This transformation follows the standard defined for each XML document (for example, PunchOutOrder Message).

For some suppliers, you might need to change the standard transformation to support extrinsic values or other departures from the standard. In most cases, the modified logic should be saved as a separate name from the standard transformation, and the newly named transformation should be associated with the relationship.

When you create a transformation that follows a newly published version of the standard, you should save the new transformation with the standard's version name suffixed at the end (for example, PunchOutOrder Message). You can use only 10 characters. When determining whether to use PeopleCode or XSLT, make the decision on a transformation-by-transformation basis.

For punchout to a direct connect vendor, the following transformations are already created in PeopleSoft Application Designer:

- PV_DC_POSR (direct connect request) applies to the PV_DC_CONNECT_REQST service operation (authentication on start of direct connect session).

- PV_DC_POSRSP (direct connect response) applies to the PV_DC_CONNECT_RESPONSE service operation (response from supplier of authentication request).

- PV_DC_POOM (direct connect items) applies to the PV_DC_ITEMS service operation (shopping cart information sent by supplier upon return to eProcurement).

For punchout to exchange.oracle.com, the following transformations are already created in PeopleSoft Application Designer: and

- PV_POSR_EXCH (direct connect request) applies to the PV_DC_CONNECT_REQST service operation (authentication on start of direct connect session).

- PV_RSP_EXCH (direct connect response) applies to the PV_DC_CONNECT_RESPONSE service operation (response from supplier of authentication request).

- PV_POOM_EXCH (direct connect items) activated by the LoadItems method from the class SCM_PV_EXTERNAL_APP.DirectConnectExch. This is launched by the PV_DC_CATCHER.Activate page when the shopping cart information is sent to eProcurement requisition.

Note. The RoundTrip direct connect method does not use transformations.

Process Flow for Direct Connect Supplier Integration Using PunchOut

This illustration describes the process flow of the integration between PeopleSoft eProcurement and a direct connect supplier who uses PunchOut. Detailed steps below this illustration described the process flow:
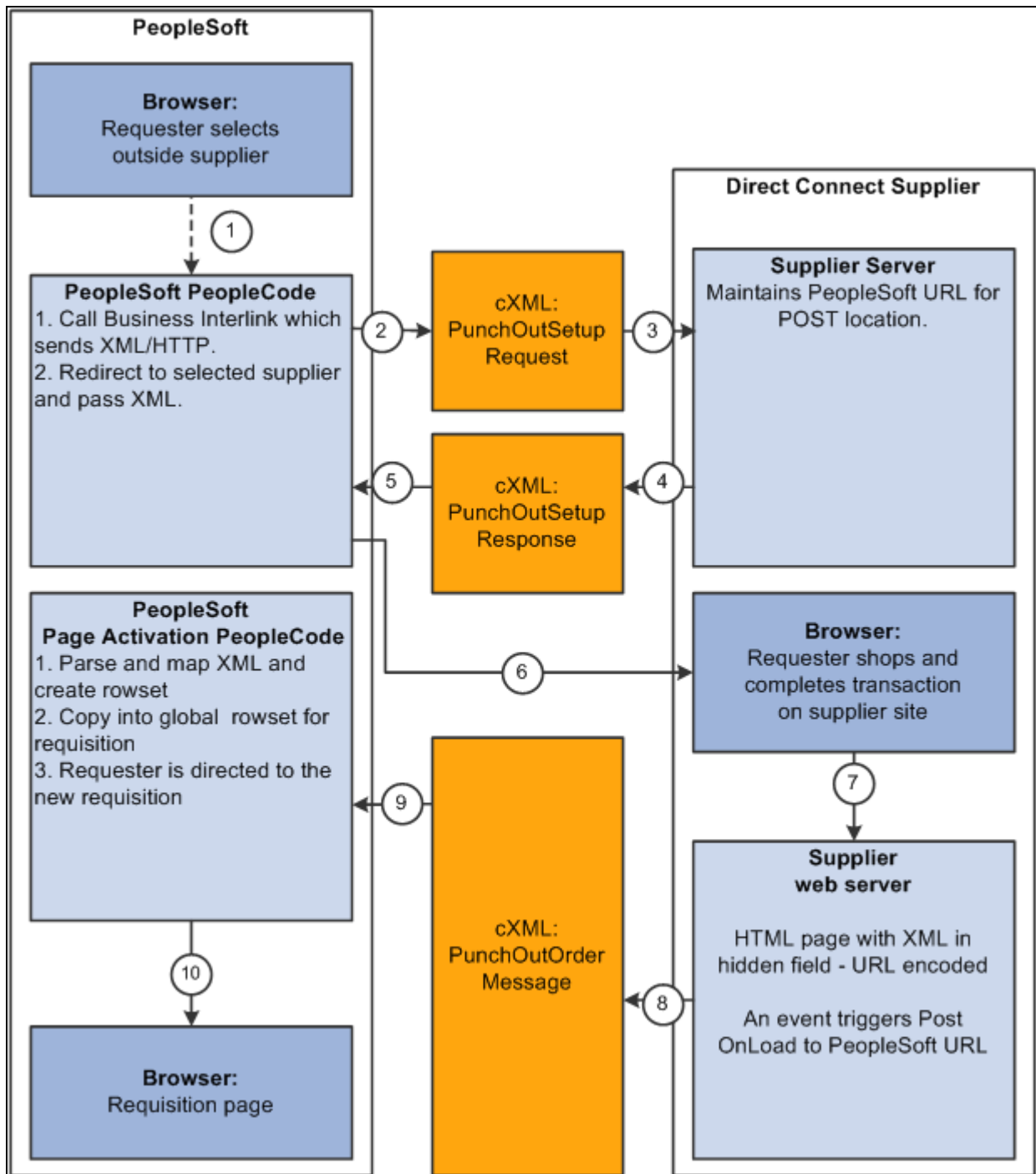
The process flow of the integration between PeopleSoft eProcurement and PunchOut using cXML.

Warning! PeopleSoft and the direct connect suppliers might have site time-outs that could cause you to lose unsaved state information.

This list illustrates the steps in the previous diagram for using PunchOut to create an eProcurement requisition:

1. The system saves all levels of the current requisition to a global rowset. This preserves the state of the requisition so that changes made since the creation or the last save of the requisition are not lost. Then, based on the supplier, the system selects the proper connection method, and the code transfers to the component that handles the method.

2. Based on the direct connect method registered to the selected supplier, the system loads the appropriate application class and runs the code to connect to the supplier. This code uses requisition data and properties for the supplier to populate a PeopleSoft service operation. The Integration Broker then transforms the service operation into the XML PunchOutSetupRequest, which contains authentication information to facilitate a single sign-on into the supplier's system.

   If a supplier implements the sign-on differently than the standards for the selected method, you should code the supplier's sign-on logic in a separate direct connect method application class or Integration Broker transformation. This XML also contains a PeopleSoft eProcurement component URL to which the supplier posts the results of the shopping cart in step 8.

3. After building the XML, the system sends it to the supplier's URL as defined in the supplier's node definition. The supplier receives this request document and authenticates the user.

4. The system returns a response to eProcurement, if the user is successfully authenticated, that contains the supplier's URL for redirection.

5. eProcurement receives this XML-based response through Integration Broker. Integration Broker runs a transformation from the PunchOutSetupResponse to the service operation behind the scenes.

   Note. The system synchronously returns the response from the original authentication request. It is not a separate process. The supplier's URL is extracted from the service operation.

6. PeopleSoft eProcurement redirects the user to the URL sent in the response from the supplier.

7. The user browses the supplier's site and places an order. Based on sign-on information, the supplier can maintain customer specific pricing. Typically, this is done at a business level, not at a user level.

8. After the order is complete and the user checks out, the supplier's site packages the shopping cart into an XML string and places it in an HTML hidden form field. The user is redirected to the eProcurement component URL specified at sign-on in step 2.

9. The eProcurement component that has been redirected to extract the XML string from the hidden form field. The string is parsed into a PeopleSoft service operation using another Integration Broker transformation. Just as in the authentication process in step 2, the application class or transformation might need to be customized if the supplier does not follow the standard document structure or has unique extrinsic fields. The user is transferred to the originating requisition.

10. When the requisition component is reinitialized, the global rowset from step 1 containing the original requisition information is reloaded. The items from the external item service operation, containing the shopping cart data, are added as new rows to the requisition. These lines inherit the requisition's line default values just as any other item being added. The system displays the requisition Summary page to the user.

Note. Items that are selected on a supplier's website are not transmitted to eProcurement unless the connection is initiated through the supplier's link in eProcurement.

Pages Used to Link to Suppliers Using PunchOut

Page Name	Definition Name	Navigation	Usage
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers Select the Marketplace Suppliers type on the Linked Suppliers page in Add mode.	Define linked suppliers for PunchOut.
Supplier Properties	PV_MS_SEC_SUP_NV	Select the Supplier Properties tab on the Linked Supplier page.	Define linked supplier properties for PunchOut.

Defining Linked Suppliers for PunchOut

Access the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers. Select the Marketplace Suppliers type on the Linked Suppliers page in Add mode).

Linked Suppliers page

Use this page to associate suppliers to nodes and then associate suppliers and nodes to their PunchOut direct connect method. Then use the Supplier Properties tab to store authentication and behavioral properties specific to the method for this supplier and node.

Enter these field values that are specific to Direct Connect Suppliers that use PUNCHOUT:

Type   Select *DirectConnect Supplier.*

Direct Connect Method   Select *PUNCHOUT.*

See Chapter 3, "Determining Technical Implementation Options," Using the Linked Suppliers page, page 46.

Defining Linked Supplier Properties for PunchOut

Access the Supplier Properties page (Select the Supplier Properties tab on the Linked Supplier page).

Supplier Properties page

Use this page to set up or change properties for a PunchOut supplier connection. Before defining properties, you should have already discussed descriptions for the fields with the supplier. For example, the authentication paths should be familiar to you because the supplier should have communicated the values they require for these paths in the XML.

Note. Make sure that you select the PUNCHOUT value for the Direct Connect Method field on the Linked Suppliers page to populate PunchOut property values on this page. When you click the Load Direct Connect Properties button, the system populates this page with predefined properties for the PunchOut method.

This table lists property values that the system uses for the PunchOut direct connect method:

Property Name	Description
ALLOW_EDIT	Equals Y if vendor allows editing of items using PunchOut. This enables users to connect back to the supplier's website to update their shopping carts. This is a behavioral property.
ALLOW_PO_CHNG	Equals Y if vendor allows changes to dispatched purchase orders.
ALLOW_SHIPPING_EDIT	Equals Y if vendor allow editing of shipping information. This enables customers to include or exclude shipping info while editing a Direct Connect item. This is a behavioral property.
ALLOW_VIEW	Equals Y if vendor allows viewing of item descriptions using PunchOut. This is a behavioral property.
CATEGORY_ID	Default category for this vendor. This is a behavioral property.
FROM_DOMAIN	Header.From.Credential.domain. This is an authentication property.
FROM_IDENTITY	Header.From.Credential.identity. This is an authentication property.
KEYWORDS	Search keywords. This is a behavioral property.
LOAD_PORTAL	Load portal upon return from vendor's site, (Y or N). This is a behavioral property.
SENDER_DOMAIN	Header.Sender.Credential.domain. This is an authentication property.
SENDER_IDENTITY	Header.Sender.Credential.identify. This is an authentication property.
SHARED_SECRET	Header.Sender.Credential.Shared Secret. This is an authentication property.

See Also

Chapter 8, "Integrating with a Marketplace," Setting Up Marketplace Suppliers and Buyers, page 160

Connecting to Suppliers Using RoundTrip

Setting up RoundTrip methods are similar to those for PunchOut. The key differences between RoundTrip and PunchOut are the authentication method, format of the shopping cart data, and the format of the purchase order.

This section discusses how to:

- Define linked suppliers for RoundTrip.

- Define linked supplier properties for RoundTrip.

Pages Used to Link to Suppliers Using RoundTrip

Page Name	Definition Name	Navigation	Usage
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers Select the Marketplace Suppliers type on the Linked Suppliers page in Add mode.	Define linked suppliers for RoundTrip.
Supplier Properties	PV_MS_SEC_SUP_NV	Select the Supplier Properties tab on the Linked Suppliers page.	Define linked supplier properties for RoundTrip.

Defining Linked Suppliers for RoundTrip

Access the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers. Select the Marketplace Suppliers type on the Linked Suppliers page in Add mode).

Linked Suppliers page

Enter these fields that are specific to Direct Connect Suppliers that use RoundTrip:

Type   Select *MarketPlace Supplier.*

Direct Connect Method   Select *RoundTrip.*

Note. After you complete a transaction using RoundTrip, you can return to view the shopping cart contents, but you cannot return to the supplier's shopping cart and make changes to the order.

See Chapter 3, "Determining Technical Implementation Options," Using the Linked Suppliers page, page 46.

Defining Linked Supplier Properties for RoundTrip

Access the Supplier Properties page (Select the Supplier Properties tab on the Linked Suppliers page).

Supplier Properties page

Use this page to set up or change properties for a RoundTrip supplier connection. Before defining properties, you should have already discussed descriptions for the fields with the supplier. For example, the authentication paths should be familiar to you, because the supplier should have communicated the values they require for these paths.

Note. Make sure that you select the *ROUNDTRIP* value for the Direct Connect Method field on the Linked Suppliers page to populate RoundTrip property values on this page. When you click the Load Direct Connect Properties button, the system populates this page with predefined properties for the RoundTrip method.

This table describes property values the system uses for the RoundTrip direct connect method:

Property Name	Description
ALLOW_VIEW	Enables the user to connect back out to the vendor's website to view ordered items. (Vendor must support FUNCTION=DETAIL in the outbound request.) This is a behavioral property.
ALLOW_PO_CHNG	Equals Y if vendor allows changes to dispatched purchase orders.
CATEGORY_ID	Default category ID for this vendor. This is a behavioral property.
KEYWORDS	Search keywords. This is a behavioral property.
LOAD_PORTAL	Load portal upon return from the vendor's site, (Y or N). This is a behavioral property.
PASSWORD	Password to load into the vendor's RoundTrip website. This is an authentication property.
RT_BUYER_MPID	Buyer marketplace ID. This is an authentication property.
RT_BUYER_ORGANIZATION	Buyer organization name. This is an authentication property.
RT_LANGUAGE	Buyer language. This is an authentication property.
RT_OCI_VERSION	Version of RoundTrip and OCI. This is an authentication property.
USERNAME	User name to log onto vendor's RoundTrip website. This is an authentication property.

Troubleshooting Error Messages

There are several errors that can occur during the direct connect process. This table contains a list of potential errors, and the means to resolve the error.

Error Text Displayed	Description	Resolution
Java exception thrown: java.net.UnKnownHostException: <machine name>	The machine specified as the *Local Gateway* in the Integration Broker configuration cannot be reached.	Change the URL to the Local Gateway in PeopleTools, Integration Broker, Gateways.
There was no response from the vendor's website while attempting to connect Error Details: … (18036, 3454)	This is thrown by RoundTrip when the Supplier's website is inaccessible.	Contact the supplier to determine if their URL has changed, or if their site is down.
An error occurred while preparing to connect to vendor's website Error Details: …. (18036, 3459)	An error occurred in PunchOut while setting extrinsic elements.	Modify the extended SetReqstExtrinsic() method.

Error Text Displayed	Description	Resolution
An error occurred while connecting to vendor's website Error Details: …. (18036, 3455)	This is a generic error, thrown by the PunchOut GoToApp() method.	This can be thrown when the PunchOutSetupResponse from the vendor is not a well-formed XML. It can also be thrown prior to that, when filling the message with data in this method.
An error occurred when transferring to the vendor's website Error Details: …. (18036, 3453)	This error message will only be thrown when there is a problem when redirecting the user to the supplier's website (using the URL that the supplier specifies in the PunchOutSetupResponse).	Contact the supplier to determine if their site is down.
An error occurred while retrieving items from vendor's website Error Details: … (18036, 3456)	This error will be displayed if there is an error when adding item data into the REQ_LINE fields.	This error requires debugging PeopleCode in the RequisitionContext class, in the FillNewReqLine() or FillExistingReqLine() method.
An error occurred while transforming the items from the vendor Error Details: (18036, 3452)	This message will occur in PunchOut when a Transformation Application Engine program, or the LoadItems() method generates an error.	Examine the PunchOutOrderMessage log on the appserver to determine if the supplier is not following the transformation for the PunchOut standard. This log can be found on the Application Server in this path: PS_CFG_HOME\appserv\<domain>\files\PV_CXML_PUNCHOUTORDERMESSAGE.txt
An error occurred while adding the new items to the requisition Error Details: (18036, 3451)	This error will be displayed in the UpdateXREF() method of the requisition context class, which fills the external item cross-reference rowset with item data from the supplier and the requisition line.	This occurrence is highly unlikely, and would have to be examined on a case by case basis to determine what caused it to happen.
The vendor's website did not return item information. (18036, 3450)	This is thrown by RoundTrip in the LoadItems() method, when the Supplier does not send item information back to eProcurement at the time of checkout, or if the item information was not in a format expected by eProcurement.	Examine the PunchOutOrderMessage log on the appserver to determine if the supplier is not following the transformation for the PunchOut standard.

Chapter 10

Creating Requisitions in PeopleSoft eProcurement

This chapter provides an overview of requisitions and discusses how to:

• Create requisitions.

• Submit requisitions.

Understanding Requisitions

A requisition in PeopleSoft eProcurement is an online form for requesting items or services. After you enter and submit a requisition, you can route it for approval. Approved requisitions are then sourced to either:

• A material stock request in PeopleSoft Inventory where warehouse personnel can fulfill the order.

• A purchase order in PeopleSoft Purchasing. The purchase order is dispatched to the vendor who fulfills the order by shipping the requested items.

Before you enter requisitions into the system, you must be authorized to process requisitions on the User Preferences page. Also, the user ID must be identified as a requester on the Requester Setup page, where you add defaults for requisitions.

See Chapter 4, "Determining Functional Implementation Options," Defining User Preferences for PeopleSoft eProcurement, page 96.

Requisition Navigator

When you create or change a requisition, a group of links appear above the requisition page. The links display the different stages of requisition creation: Define Requisition, Add Items and Services, and Review and Submit. As you go through requisition creation, the stage that you are currently using is highlighted. To advance or return to a stage, select the stage.
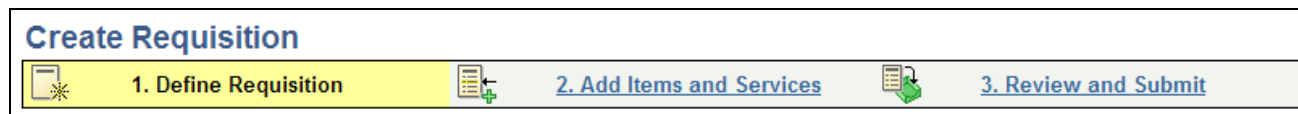
Requisition Navigator

Requisition Summary

The Requisition Summary, or shopping cart, appears as a sidebar to the left and below the PeopleSoft menu. The requisition summary displays all of the items that you have added to the requisition (item description, quantity ordered, unit of measure (UOM)), plus the number of line items on the order and the total amount expressed in the transaction currency.

Requisition Summary		
Description	Qty	UOM
Deluxe Sports Stove, Doubl...	1	EA
4 Season Convertible Tent	1	EA
3 Season Mummy Bag, Regular	1	EA
Air Mattress, Double	1	EA
Electric Light/Latern	1	EA
Total Lines:	5	
Total Amount (USD):	325.00	

Requisition Summary

Requisition Item Browse and Search

PeopleSoft eProcurement uses browse and search features to help you find items to include in requisitions. A basic search enables simple browsing and searching of requisition items. In addition, you can perform a more advanced search, as well as a parametric search of selected attributes. You can update search settings and perform exact word searches.

Item Favorites and Favorites Groups

Item favorites are items that are frequently ordered and are maintained in a single location. You can reduce the time that is needed to find an item by using item favorites. The list of favorite items that you create is private, accessible only to you, and is stored by your user ID.

Favorites groups enable you to group your favorite items, which enables you to find the items quickly when creating a requisition. Favorites groups can be shared with other users, and a user can copy the favorite groups of another user.

Item Templates

You can reduce the time that is needed to enter requisitions by creating item templates, which consist of sets of items that you frequently order together. During order entry, use the templates to add these items to the requisition without searching the item catalog.

PeopleSoft eProcurement offers these templates:

Personal templates   Personal templates are private and accessible only to the user who creates them.

Company templates	Company templates, also called Purchasing Kits, are used throughout the business. Only users with the correct authority can create or change company templates, but all users in the PeopleSoft Purchasing business unit have access to them. To maintain company templates for PeopleSoft eProcurement, use the Purchasing Kits feature. To access the feature, select eProcurement, Administer Procurement, Maintain Item, Purchasing Kits.

After a template has been added to a requisition, you can change the quantity of any item, delete items, or add additional items to the request. When you add a template to a requisition, the system adds only the active items in the template to the requisition. Click the Expand Section button to see more information about items within a template and how many of each item are to be added to the requisition.

Enter the number of sets to add to the requisition in the Qty field, and click the Add button.

Note. Item templates, which can include items from the standard item catalog, special request items, or items from PeopleSoft Services Procurement, are designed for groups of items. To save a single item, use the favorites lists.

See Also

Common Elements Used in This Chapter

AM Unit (asset management unit)	Select a PeopleSoft Asset Management business unit to capitalize all items on this requisition in PeopleSoft Asset Management. This entry overrides values that otherwise appear by default from the item definitions.
Account	Change this value only to change the standard accounting structure.
Accounting	Click to access general ledger information and define accounting rules for items that you are adding to a requisition.
Amount	Displays the total item price in the transaction currency from the requisition.
Apply	Click to apply the changes that you've made, for example, changes to shipping or accounting information.
Asset Profile ID or **Profile ID**	Select an ID to capitalize all items on this requisition in PeopleSoft Asset Management. This entry overrides values that otherwise appear by default from the item definitions.
Capitalize	Select to indicate that the items on this requisition should be capitalized in PeopleSoft Asset Management. This check box is available only if a PeopleSoft Asset Management business unit is selected.

Catalog	Displays the name of the PeopleSoft catalog in which this item is located. Define item catalogs with PeopleSoft Tree Manager.
Category	Displays the item category from the Item Definition - General page.
Consolidate with other Reqs (consolidate with other requisitions)	Select to consolidate multiple requisitions for the same vendor into one purchase order.
Delete	Click to remove a selected item from a requisition.
Department	Displays any default value from the requester definition.
Due Date	The date that the shipment is scheduled to arrive at the destination (ship to location).
Find Items	Click to add items to the requisition. As items are added to a requisition, they appear in the Requisition Cart component on the left side of the current page.
GL Unit (general ledger unit)	Displays the PeopleSoft General Ledger business unit that is defined on the Purchasing Definition - Business Unit Definition page.
IN Unit	The Inventory business unit where the items should be put away when they are received.
Location Code	Displays the internal location for the delivery of this requisition, for example, office number, lab name, and so on. The value comes from the requester setup definition.
Manufacturer	Indicates the manufacturer of the item, which is assigned on the Manufacturer's Item page.
Manufacturer's Item ID	Displays the item ID that the manufacturer uses, which is assigned on the Manufacturer's Item page.
Mfg ID (manufacturer's ID)	Identifies the manufacturer of the item. This value is supplied from the Vendor's Manufacturer Info page.
Mfg Itm ID (manufacturer item ID)	Displays the identifier that the manufacturer uses for this item when the suggested vendor supplies the item. This value appears from the Vendor's Manufacturer Info page.
Modify Shipping Address	Click to access the Shipping Address page, where you can change the shipping address.
Percent	Enter a percentage of the quantity or the amount to distribute. The system updates either the Amount or Quantity field value, depending on the selection in the Distribute by field.
Price	Displays the vendor's unit price and currency for the item, which are assigned on the Vendor's UOM & Pricing Info (vendor's UOM and pricing information) page.

Product	Identifies a product.
Project ID	You can enter any information that is relevant to the project.
Quantity	Enter the quantity of items that you want distributed on this distribution line. This field appears only if you select *Qty* as a distribution method in the Distribute by field. The system updates the value in the Percent field based on the entry.
Requester	The user ID of the person for whom the requisition is created.
Select All/Deselect All	Select to select all items or to deselect all selections in a list. The check box appears beneath the list to which it pertains.
Ship To	Displays the organization ship location that the vendor should use for delivery for this requisition. This field is populated from the requester definition.
Standard Price	Displays the standard price from the Purchasing Attributes page for the item.
Status	Displays the status of a requisition. Values are *Open,Pending,Approved,* and *Complete.*
Unit of Measure(UOM)	Displays the UOM from the Vendor's UOM & Pricing Info page for the item. The Units of Measure page (Items, Define Items and Attributes, Units of Measure) has a field labeled Default Req UOM. The UOM that appears to the requester is the one that is marked as the Requisition UOM. If this option is not selected, then the item vendor UOM or standard UOMappears.

See *PeopleSoft Enterprise Managing Items 9.1 PeopleBook*, "Working with Items," Using Item Quantity UOM.

Note. If the requester is assigned to the eProcurement role action of VIEW_ORDERING_UOM, and the item is set up with a default requisition UOM, the default requisition UOM will appear on the requisition.

See Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39. |
UPN ID (universal product number ID)	Enter the UPN ID that is assigned to a unique combination of item ID, manufacturer ID, and UOM. The UPN appears on the Item Description page when it is associated to an item manufacturer.
Vendor	Displays the vendors that supply this item. This information appears by default from the Item Vendor page.
Vendor Item ID	Displays the ID that the vendor uses to identify this item on the Item Vendor page.
Vendor Loc (vendor location)	Displays the location of the vendor. The default is based on the value that is defined for the vendor.

🔍 (Vendor Look Up)	Click to access the Vendor Search page, where you can enter information to find a vendor.
Vndr Catlg (vendor catalog)	Displays the vendor catalog identifier that appears from the Purchasing Attributes - Item Vendor Priority page.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Item Attributes

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options," Defining Purchasing Processing Options

Creating Requisitions

This section provides an overview of requisition creation and discusses how to:

• Define requisitions.

• Find requisition items.

• View item details.

• Select favorite items and item groups to include in requisitions.

• Use template items to create requisitions.

• Select forms to include in requisitions.

• Select direct connect suppliers or the Oracle Supplier Network for requisitions.

• Add special requests to requisitions.

Understanding Requisition Creation

PeopleSoft eProcurement enables users to create requisitions in an efficient manner. The key to entering requisitions quickly is defining a proper default structure which prevents you from changing information on the requisition. For a requisition with no changes to the default structure, you can enter the items, review the request, and submit it using two PeopleSoft pages: the Add Items and Services page and the Review and Submit page. For more complex requisitions, PeopleSoft eProcurement provides a number of links to additional information.

Pages Used to Create Requisitions

Page Name	Definition Name	Navigation	Usage
Define Requisition	PV_REQ_HDR_DEFAULT	eProcurement, Create Requisition	Define requisitions, including the purchasing business unit and the requester for the requisition. You can also define default values for requisition lines.
Vendor Search	PV_VNDR_LOOKUP_WRK	Click the Vendor Lookup button on the Define Requisition page.	Search for requisition vendors. This page is accessible from numerous requisition creation pages.
Shipping Address	REQ_DFLT_ADDR	Click the Modify Onetime Address link on the Define Requisition page.	Temporarily override shipping address information. See Chapter 10, "Creat," Modifying Line, Shipping, and Accounting Information, page 269.
Catalog	PV_SRCH_REQ_PARAM	eProcurement, Create Requisition, Add Items and Services Select the Catalog tab.	Find requisition items.
Search Settings	PV_SRCH_REQ_PREF	Click the Search Settings link on the Catalog page.	Define the number of rows of results that you want to display per page.
Item Description	PV_ITM_DESCR PV_NEW_ITM_DESCR	• Click the description link for the item on the Catalog page. • Click the description link for the item on the Review and Submit page. • Click the description link for the item on the Favorites page.	View item details.
Favorites	PV_REQ_ITM_FAVS	eProcurement, Create Requisition, Add Items and Services Select the Favorites tab.	Select favorite items and item groups to include in requisitions. Add items to your favorites list, and group favorite items into favorite groups.

Page Name	Definition Name	Navigation	Usage
Templates	PV_REQ_TEMPLATES	eProcurement, Create Requisition, Add Items and Services Select the Templates tab.	Use template items to create requisitions. Create new templates and add items to existing templates.
Services	SPF_REQ_INFO_PG	eProcurement, Create Requisition, Add Items and Services Select the Services tab.	Include services in requisitions. This page is used for Service Procurement only. See *PeopleSoft Enterprise Services Procurement 9.1 PeopleBook*, "Creating and Managing Services Procurement Requisitions," Understanding How to Create a Services Resource Requisition Line.
Forms	PV_REQ_SR_WIZ_MAIN	eProcurement, Create Requisitions, Add Items and Services Select the Forms tab.	Select forms to include in requisitions.
Web	PV_MERCHANTS	eProcurement, Create Requisition, Add Items and Services Select the Web tab.	Select direct connect suppliers for requisitions.
Special Request	PV_REQ_SPECIALREQ	eProcurement, Create Requisitions, Add Items and Services Select the Special Request tab.	Add special requests to requisitions.

See Also

Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39

PeopleSoft Enterprise Services Procurement 9.1 PeopleBook, "Creating and Managing Services Procurement Requisitions," Requisitions

Defining Requisitions

Access the Define Requisition page (eProcurement, Create Requisition).

Create Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: US100 US100 OPERATIONS

*Requester: VP1 Kenneth Schumacher   *Currency: USD

Requisition Name: Priority: Medium

▼ Line Defaults

Default Options

⦿ Default   If you select this option, the defaults specified below will be applied to requisition lines when there is no predefined values for these fields.

○ Override   If you select this option, the defaults specified below will override any predefined values for these fields.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: US001   Modify Onetime Address

Due Date: Attention:

Accounting Defaults   Customize | Find | | | First ◄ 1 of 1 ► Last

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information	

Pct	Location	GL Unit	Entry Event	Account	Alt Acct	
	US001	US005		600020		⊟

Continue

Define Requisition page

This page enables you to define information for a new requisition. As you add items to the requisition, they appear in the Requisition Summary along with cost information.

Before using this page, determine the features that your users can access by linking user roles to the following eProcurement role actions:

- The CHANGEREQBU role action is required to access the Business Unit and Requester fields on this page. For users without this role action, these fields cannot be changed. The values in these fields default from the User Preferences component.

- The ALLOW_DEFAULT_OPTIONS role action enables a user to select between the default options of Default or Override within the Line Defaults group box of this page. Without this role action, the user can only enter default values, not override values.

- Requesters with the eProcurement role action of NOVICEREQSTR cannot access this page.

See Chapter 3, "Determining Technical Implementation Options," Maintaining System Users and Roles, page 37.

Requester	Enter the name of the person requesting these materials or services. This can be your name or you can purchase on behalf of another person. For you to purchase on behalf of another user, these requesters must be defined on the User Preferences page.

Requisition Name Enter a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.

Currency Displays the currency that is selected for the business unit. This can be overridden if the business unit allows for multicurrency processing.

Priority Enter a priority for reporting or query purposes.

Defining Requisition Line Default Values

The fields that you enter on this page can be applied to the entire requisition at the line, shipment, or distribution levels.

Default Options Determines how your entries in the Line Defaults group box are applied. The options are:

- *Default:* The values that you enter in the Line Defaults group box are applied to the entire requisition (i.e. at the line, shipment schedule, or distribution line levels) only if there is no default value from the item default hierarchy in PeopleSoft eProcurement and Purchasing. When a value comes from the default hierarchy, it is displayed in this group box and any change to this value is ignored. When no predefined values exist, the data that you enter in the line defaults section replaces blank fields as defaults. The Default option is the only available choice if your user ID is not linked to the ALLOW_DEFAULT_OPTIONS eProcurement role action.

  If you have selected the default option and need to override values at the line level, use the Modify Line/Shipping/Accounting page within this component.

  See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Using Default Hierarchies," Purchasing Item Default Hierarchy.

- *Override:* The values that you enter in the Line Defaults group box are applied to the entire requisition (i.e. at the line, shipment schedule, or distribution line levels). When a value comes from the item default hierarchy, it is displayed in this group box and any change to this value will override the default value for this requisition. The Override option is only available if your user ID is linked to the ALLOW_DEFAULT_OPTIONS eProcurement role action.

Vendor Select the vendor for the items on this requisition. The default location for the selected vendor appears to the right of the Vendor field. You can select a different location. However, use caution when changing the vendor location. Purchase orders are not sent to marketplace unless the vendor ID and vendor location match those values that are defined on the Linked Supplier Setup page. To access the page, select eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers.

Vendor Location	View the location of the vendor. The default is based on the value that is defined for the vendor.
Buyer	Select a buyer for this requisition. At the requisition line level, the system uses the buyer from the item definition or item vendor.
Category	Define a default category for this requisition.
Unit of Measure	Define the UOM for use on this requisition.
Ship To	Select the standard address to which most of the requisition is delivered.
Modify Onetime Address	Click to access the Shipping Address page, where you can override a shipping address that is not in the standard ship to location codes.
Due Date	The standard date in which the customer wants to receive the items on this requisition.
Attention	Enter the name of the individual who should receive the items or services. Once the shipment is received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the vendor.
Accounting Defaults	Enter ChartField and asset management information.
	Note. The ChartField values on this page are described further in the preface of this PeopleBook.

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Defining and Using ChartFields"

PeopleSoft Enterprise Commitment Control 9.1 PeopleBook, "Setting Up Basic Commitment Control Options"

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Importing Vendor Information"

Finding Requisition Items

Access the Catalog page (eProcurement, Create Requisition, Add Items and Services. Select theCatalog tab.

Catalog page

Use this page to find items for a new or existing requisition. You can search for items to include in a requisition by:

- Using the Search field to enter key words or phrases for a search.

  This search looks for items in catalogs, favorites list, templates, services, forms, and the web and displays the results of the search in collapsible grids.

- Browsing catalogs.

  This search method defines which catalogs the system uses when checking for an item. Using a tree, you can further define catalog categories.

- Searching catalogs for item attributes such as manufacturer, item ID or vendor name, and price ranges.

  After you enter search criteria, click the Search button to complete the search.

Search	Enter a value to search on from the item description. The system searches all catalogs for items that match the criteria that you enter. Other fields that are defined for the item, such as vendor name, manufacturer name, item ID, manufacturer ID, vendor ID, vendor item ID, or manufacturer item ID, can also be located from here depending on the setup of the system.
	Use any combination of letters, numbers, and spaces. The field is not case-sensitive. Don't use quotation marks, Boolean search qualifiers, wildcards, punctuation marks (except for the apostrophe), or special characters, such as %, |, ^, #, @, $, (, and). To initiate a search, click the Search button.
	Note. Consecutive words are treated as a phrase, and the search finds words that appear in that order. For example, a search for *bike frame* finds results such as *bike frame,steel and bike frame,* and *aluminum,* but not *auto frame* or *frame support.*
	Note. If you use the Verity search engine, you can use Boolean search terms such as *AND, OR,* and *NOT* as connectors.
Search Catalog	Enter search criteria in the appropriate search fields to search through the item catalogs.
	Note. To use the browse functionality, you must create item catalogs using a PeopleSoft tree. Then attach the item catalog to each business unit or requester who should have access.
Show Additional Attributes	Click to display additional attributes based on category.
	Note. Attributes must be loaded for both the item and the category for this link to work.
Hide Additional Attributes	Click to hide any additional attributes.
Include Images	Select if you have image files associated with the item, and you want to display the image during your search. If images are defined at the item vendor and at the purchasing attributes levels, the image that is displayed is the image that is defined at the item vendor level. If an image is defined at the purchasing attributes level only, then this image is displayed.
Match Case	Select if you want to have the search engine locate exact lower and upper case matching.
	Note. This is valid only when you are using Verity.
Exact	Select if you want the system to match the exact wording of the requester when conducting a search.
	Note. This is valid only when you are using Verity.

Search	Click to perform a search using the catalog and categories that you selected. You can further define the search criteria using the fields in the Search Catalog group box. After you perform the search, you can use the results to incorporate into a requisition or add to the favorites list.
Search Settings	Defines how the search page appears. You can specify how many result lines appear, whether the search criteria appears, and whether to have a message appear that indicates when selection criteria will no longer be valid. If you have set up the installation options for Verity, you can also then select fields for searching. These fields vary depending on the setup.
	See *PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook*, "Implementing the Verity Search Engine."

Search Results

The search results appear after you enter criteria and click the Search button.

To view the items within a section, click the Expand button. You can also perform another search on this page.

Add Items	Click to add items to the requisition along with the item quantities that you defined. The items with a defined quantity are added to the requisition. Then you are automatically taken to the Review and Submit page.
	If the quantity you enter is below the minimum quantity or above the maximum quantity of the vendor item, then an error message is displayed. Correct the quantity before proceeding.
Forms	Based on the setup for item searches, the system could display any express forms that meet the search criteria.
Web	Based on the setup for item searches, the system could display any items from direct connect suppliers that meet the search criteria. You can link directly to their web sites and enter orders. The system transfers the orders back and automatically creates a PeopleSoft eProcurement requisition. Using a similar process, buyers can then create a purchase order from the requisition and source it to the supplier.
Sort Items	Select to sort the search results by *Item Description, Manufacturer, Price,* or *Vendor.*
Hide Image	Click to prevent item images with the description from appearing.
Show Image	Click to display item images with their description. Images appear only if they are available.

Items might appear in this area before a search is performed if they are in the All Items category.

Search results include:

Item Description	Click the description for the item to access the Item Description page, where you can view details about the item.
Vendor	Displays the name of the vendor who supplies this item. The system uses the vendor's default location. You can change to another location with the Requisition Defaults page. If more than one vendor supplies the same item, you might see multiple rows for the item. To view more than one vendor, you must have the eProcurement VIEW_ALL_VENDORS role action.
(Preferred Vendor icon)	Appears next to any row with a preferred vendor in the Vendor Name column.
Add Multiple Items	Click to add multiple items to requisitions. When you click the button, the system adds items to the requisition that has a check mark in its corresponding check box. Items with a defined quantity are added to the requisition. If you are using the PeopleSoft eProcurement role action of NOVICEREQSTR, then you are automatically taken to the Review and Submit page.
Add to Favorites	Click to add selected items to the favorite's list. A message appears confirming that the item has been added to the favorites list.
Compare	To compare two items side by side, select the check boxes to the left of the item descriptions and click this link. This enables you to compare the item results with other items from the selected category that share the same attributes.
	Note. To use this feature, you must load or enter attributes into the PeopleSoft Item Master tables. After attributes are loaded or entered, users can view a comparison matrix at the bottom of the Search Catalog page.

See Also

PeopleSoft Enterprise Supply Chain Management Common Information 9.1 PeopleBook, "Implementing the Verity Search Engine"

Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39

Viewing Item Details

Access the Item Description page (Click the description link for the item on the Catalog page).

Create Requisition

	1. Define Requisition		2. Add Items and Services		3. Review and Submit

4 Season Convertible Tent

No image for this item

Item ID:	10032
Requisition Price:	150.00000
Category:	Camping Equipment
Catalog ID:	ALL_PURCHASE_ITEMS
Unit of Measure:	Each Conv. Rate: 1 Qty: [ ] 🛒 Add

Item Detail   Customize | Find | 🗗 | 🏬 | First 🞀 1-2 of 2 🞂 Last

| Vendor Options | More Details |

Vendor	Location	Vendor Item ID	Price	Unit	Manufacturer	Mfg Item ID	Add Item	
CAMPER'S WAREHOUSE	MAIN		140.00000 USD	Each			🛒 Add	
TRAILBLAZERS	MAIN		139.50000 USD	Each			🛒 Add	

Inventory Availability

Ship To Location:

US001 🔍	Inventory BU	Quantity Available	UOM
	US009	0	EA
	US010	1320	EA
	US011	100	EA
	Total Quantity Available to this location: 1420		EA

Return to Previous Page

Item Description page

Use the Item Description page to view price, item ID, primary vendor, manufacturer, and item category. When you are adding an item using favorites, searching, or browsing, then you can also view all vendors and the available quantities in the Inventory business units. Click the Show Image link to display images if they are available.

Selecting Favorite Items and Item Groups to Include in Requisitions

Access the Favorites page (eProcurement, Create Requisition, Add Items and Services. Select the Favorites tab).

Favorites page

The Favorites page has two functions:

• You can add items to the requisition.

• You can organize favorite items into favorite groups or templates.

Favorites are frequently ordered items and groups of items that you can maintain in a single location. You can create a list of items that are frequently ordered and you can organize them by creating favorites groups. You can use the list to add items to a requisition without searching the item catalog.

Ungrouped items are private, accessible only to you, and are stored under the user ID. The list can be built from items in PeopleSoft eProcurement or PeopleSoft Services Procurement.

Favorites groups can be shared with other roles and users, and are stored by user ID. You create favorites groups by using the Favorites tab on the Add Items and Services page.

This page displays the most current favorite items and favorites groups defined.

To add a favorite item or groups of items to this requisition, select the check box to the left of the item or item group, and click the Add button. You can update quantities when you access the Review and Submit page.

Note. To save a group of items that are ordered together, use the Add to Template(s) button.

The Status and Type Columns

Information about the Favorites include the current item status and the type of item.

Status	Displays one of these values:
	Active: the item is available for the user to order.
	Inactive: the item is active at the business unit level, the set ID level, or both levels.
	Unavailable: the user does not have access to the item.
	Vendor Item Inactive: the item is inactive for the vendor.

The Type column displays to the left of the Description column and indicates where the item originated. Drag the cursor across the icon to see where the item originated. To view more information about an item, click the Item Description link.

(Catalog Item)	Item is from the PeopleSoft item tables.
(Special Request)	Item was created on the Special Request tab of this component.
(Express Form)	Item is an express form from the Forms tab of this component.
(Web Vendor Update)	Item is a direct connect item using PunchOut. Click this icon to be transferred to the supplier's website in edit mode. On the supplier's website you can inspect the item and change the quantity. After you check out from the supplier's website, the item is added to the requisition with the latest price and item description. In order to access the supplier website, the Supplier Properties page must have the ALLOW_EDIT and ALLOW_VIEW properties for the supplier.
(Web Vendor)	Item is a direct connect item using RoundTrip. The item price and description are validated in the background against the supplier's online catalog. In order to validate and update the item, the supplier catalog must support the validate function.

Adding Items to a Favorites List

You can add items to the favorites list during requisition entry by using the Search field at the top of the page, the Search Catalog group box on the Catalog tab, or the Review and Submit page. After your search:

1. Select one or more items using the check box to the left of the item description.

2. Click the Add to Favorites button.

A message appears confirming that the items have been added to the favorites list.

Adding Items to Favorites Groups

To add items to a favorite group, the items must be in your favorites list.

1. Select the items from your favorites list.

2. Click the Add to Favorites Group(s) button.

3. Select a favorite group, or enter the group name and description to create a new favorite group.

4. Click the OK button.

Note. When an item is added to a favorites group, it no longer appears as an ungrouped item.

Deleting Items from a Favorites List

You can delete favorite items and favorites groups by using the Favorites page. To delete a favorite item or item group, select it and then click the Delete from Favorites button.

Using Direct Connect Items on a Favorites List

To add direct connect items to a favorites list:

1. Place direct connect items on an eProcurement requisition by using the Web page of the Create Requisition component. The Web page enables you to access the supplier's online catalog. You can browse the catalog, find the items to order, and then use the supplier's shopping cart to collect one or more items. When you check out on the supplier's website, you return to PeopleSoft and the items are added to the eProcurement requisition.

2. On the Review and Submit page, select the direct connect item and click the Add to Favorites button.

Note. Direct connect items cannot be added to the favorites list unless this feature has been enabled on the eProcurement Installation Options page.

To use a direct connect item that has been saved as a favorite:

1. When creating a new requisition, go to the Favorites page and select the desired direct connect item. Use the Type column to identify a direct connect item by dragging the cursor across the icon.

2. Click the item description of the direct connect item or the Add button:

   • (PunchOut items only) If the Web Vendor Update icon type is displayed for the direct connect item, then you are transferred to the supplier's website in edit mode. On the supplier's website you can inspect the item and change the quantity. After you check out from the supplier's website, the item is added to the requisition with the latest price and item description. In order to access the supplier website, the Supplier Properties page must have the ALLOW_EDIT and ALLOW_VIEW properties for the supplier.

   • (RoundTrip items only) If the Web Vendor icon is displayed for the direct connect item, then the item price and description are validated in the background against the supplier's online catalog. In order to validate and update the item, the supplier catalog must support the validate function.

   • For all other direct connect items and suppliers without the edit, view, or validate properties, click the Add button on the Favorites page to add the item to the requisition without verification from the supplier that the item information is current. Click the item description on the Favorites page to display the catalog description.

3. Once you have completed your requisition, access the Review and Submit page and click the Save button. The requisition is now saved and, in addition, any new information obtained from the supplier's website, such as a price change, is used to update the direct connect item on the Favorite list.

Keep in mind the following points when working with direct connect favorite items:

• Direct connect items from multiple suppliers cannot be added to a requisition in one step. If you select multiple items from the Favorites list and add them all at one time by clicking the Add button at the bottom of the Favorites page, then the system can only validate the items if you have selected Punchout items using the same supplier. You are taken to the supplier's website to view and edit all of the selected items.

• Direct connect items and Services Procurement items cannot be added to a requisition in one step.

• Non-direct connect items can be part of the items to be added along with direct connect items and Services Procurement items.

• If there are multiple suppliers or non-PunchOut direct connect items, then the item data is not verified against the supplier's website.

• If you need to add direct connect items from multiple suppliers to one requisition, it is recommended that you add each favorite item individually.

Using Template Items to Create Requisitions

Access the Templates page (eProcurement, Create Requisition, Add Items and Services. Select the Templates tab).

Templates page

Click the Expand Section button to view items that belong to the template.

Purchasing kits and templates are included in this list. Purchasing kits display the item, quantity and UOM. Templates display the same information as Purchasing Kits, plus the vendor, status, price, and currency.

After expanding the section, you can select the Description column heading to sort the items and view the quantity of each item. Use the Quantity field to enter the number of sets that you want.

Click the Add button to add all items in the template to the requisition.

Creating Personal Templates

To create a personal template:

1. Access the Favorites page or the Review and Submit page.

2. Select the items that you want to add to an existing template or a new template.

3. Click the Add to Template(s) button.

4. Select a template or enter the template name and description to create a new template.

5. Click the OK button.

Using Direct Connect Items on a Personal Template

To add direct connect items to a personal template:

1. Access the Favorites page or the Review and Submit page.

2. Select the direct connect items that you want to add to an existing template or a new template. For one template, all direct connect items must come from the same supplier. You can mix direct connect items with non-direct connect items; however, you cannot add Service Procurement items into the same personal template with direct connect items.

3. Click the Add to Template(s) button.

4. Select a template or enter the template name and description to create a new template.

5. Click the OK button.

Note. Direct connect items cannot be added to a template unless this feature has been enabled on the eProcurement Installation Options page.

To use a direct connect item that has been saved in a template:

1. When creating a new requisition, go to the Templates page, find the template and enter the quantity desired.

2. Click the Add button:

   • (PunchOut items only) Any non-direct connect items are added to the requisition; then, if the Supplier Properties page has the ALLOW_EDIT and ALLOW_VIEW properties for the supplier, you are transferred to the shopping cart of the supplier's website. You can use the shopping cart to review the PunchOut items from your template and change the quantities. After you check out from the supplier's website, you are returned to PeopleSoft eProcurement and the PunchOut items are added to the requisition with the latest price and item description.

   • (RoundTrip items only) Any non-direct connect items are added to the requisition; then, if the supplier catalog supports the validate function, the price and description of the RoundTrip items are validated in the background against the supplier's online catalog.

   • For all other direct connect items and suppliers without the edit, view, or validate properties, the direct connect items on your template are added to the requisition without verification from the supplier that the item information is current.

3. Once you have completed your requisition, access the Review and Submit page and click the Save button. The requisition is now saved and, in addition, any new information obtained from the supplier's website, such as a price change, is used to update the direct connect item on the template.

Selecting Forms to Include in Requisitions

Access the Forms page (eProcurement, Create Requisitions, Add Items and Services. Select the Forms tab).

Forms page

Express forms enable you to use a standardized form to order products that might need additional supporting information.

If you set the system up for express requisition, requesters with the eProcurement role action of EXPRESSREQ_ENTRY are able to access the express requisition links. These links enable the requester to create requisition lines by directly entering the item ID, description, category, quantity, UOM, price, vendor, vendor location, vendor item ID, vendor catalog, manufacture ID, and manufacture item ID

See Also

Chapter 11, "Using Special Requests and Express Forms to Create Requisitions," Understanding How to Create Express Forms, page 296

Chapter 11, "Using Special Requests and Express Forms to Create Requisitions," Ordering Items from Express Forms, page 300

Chapter 11, "Using Special Requests and Express Forms to Create Requisitions," Understanding Express Requisitions, page 302

Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39

Selecting Direct Connect Suppliers or the Oracle Supplier Network for Requisitions

Access the Web page (eProcurement, Create Requisition, Add Items and Services. Select the Web tab).

Web page

Use this page to select a direct connect supplier or the Oracle Supplier Network from which you can select items to add to this requisition.

See Chapter 7, "Integrating with the Oracle Supplier Network," page 141.

See Chapter 9, "Integrating with Direct Connect Suppliers," page 203.

Adding Special Requests to Requisitions

Access the Special Request page (eProcurement, Create Requisitions, Add Items and Services. Select the Special Request tab).

Special Request page

Use the Special Request page to create requisitions for items or goods that are not included in the standard catalog of items in PeopleSoft eProcurement and have no item ID. This special request can be for goods or services.

See Also

Submitting Requisitions

After defining items for a requisition, use the Review and Submit link to review the contents of the requisition, make final adjustments, or add last-minute items to the requisition.

This section discusses how to:

*   Review, edit, and submit requisitions.

*   Add comments to the requisition lines.

*   Modify line, shipping, and accounting information.

*   Change distribution information.

*   Maintain value added tax details for shipping lines.

*   Add multiple comments at the requisition header.

*   Confirm requisition checkout information.

Pages Used to Submit Requisitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Review and Submit	PV_REQ_FORM	eProcurement, Create Requisition Click the Review and Submit link.	Review, edit, and submit requisitions that have not been submitted for approval. Also, submit requisitions for approval.
Line Details	PV_REQ_LINE_DTLS	Click the Line Details icon on the Review and Submit page.	Confirm requisition checkout information and edit additional details for a line, such as the buyer, vendor, and other line-specific information.

Page Name	Definition Name	Navigation	Usage
Line Comments	PV_REQ_COMMENTS PV_REQ_COMMENTS_NW	Click the Comments button on the Review and Submit page.	Record one or more comments about an requisition line and add attachments. You are limited to one comment and one attachment unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
Standard Comments	PV_STD_COMM_SEC	Select the Standard Comments link on the Line Comments page.	Use this page to apply a standard comment as a comment to the requisition line or requisition header. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. Enter search criteria of Comment Type, Comment ID, or Description and then click the Search button to display the standard comments. Select a standard comment and click OK to apply the comment to the requisition. See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Setting Up Standard Comments.

Page Name	Definition Name	Navigation	Usage
Include Item Specifications	PV_ITEM_SPEX	Select the Use Item Specifications link on the Line Comments page.	Use this page to apply the item's specifications as a comment to the requisition line. The item specifications are defined on the Item Specifications page (ITEM_SPEX_PUR) located in the item definition (Purchasing Attributes component). The item specifications are automatically included as a line comment if the Copy to Transactions check box has been selected on the Item Specifications page. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook* , "Defining Purchasing Item Information," Entering Purchasing Item Specifications.
Requisition Ship To Comments	PV_REQ_COMMENTS_NW	Click the Edit Shipto Comments link on the Review and Submit page.	Record one or more comments with the Ship To value on the rquisition shipment schedule line. You can also include attachments.
Modify Line/Shipping/Accounting	PV_REQ_APLY_DEF	Click the Modify Line/Shipping/Accounting button on the Review and Submit page.	Modify line, shipping instructions, and accounting details for requisition lines.
Distribution Change Options page	PV_REQ_DIST_CHNG	After entering changes in the Accounting Information group box of the Modify Line/Shipping/Accounting page, click the Apply button.	Select how to apply distribution changes to the lines of your requisition.
Maintain Requisitions - VAT Information for Schedule (value added tax information for schedule)	REQ_SCHED_VAT	Click the Shipping VAT button on the Review and Submit page.	Maintain value added tax details for shipping lines.

Page Name	Definition Name	Navigation	Usage
Header Comments	PV_REQ_COMMENTS_NW	Click the More Comments link on the Review and Submit page.	Record one or more comments about a requisition and add attachments. You are limited to one comment at the header-level of the requisition unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
Confirmation	PV_REQ_WF_PREVIEW	Click the Save and Preview Approvals button on the Review and Submit page.	Confirm requisition checkout information.

Reviewing, Editing, and Submitting Requisitions

Access the Review and Submit page (eProcurement, Create Requisition, Review and Submit).

Review and Submit page

Use this page to review, edit, and submit a requisition for approval.

Requester	Displays the name of the requester for this requisition. To purchase on behalf of another requester, you can change this field. However, you must have the CHANGEREQBU role action from the eProcurement Role Actions page assigned to the user roles in the user ID. Also, the user preferences for the user ID must specify that you are authorized to enter for other requesters.
Requisition Name	Enter a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.
Currency	Select the base currency that is used to calculate pricing for each item on the requisition.
Priority	Select the urgency for a requisition workflow approval. Values are *Low, Medium,* and *High.*
Card Number	Select a valid procurement card.
Line	Displays the line number for this requisition item.
▷ (Expand Section icon)	Displays information that pertains to this specific line.
Description	Click the description of the item to view the Item Description page for more information about the item.
Vendor Name	Displays the name of the vendor who supplies this item.
Quantity	Displays the units of this requisition item that you are ordering. You can change the value.
UOM (unit of measure)	The ordering UOM for this item.
Price	Displays the price per unit.
(Line Details icon)	Click to access the Line Details page, where you can modify additional details on the line, such as the buyer, vendor, and other line-specific information.
Amount Only	Select to indicate that the line is an amount-only line. If you select this option, the requisition quantity is set to *1* and the field becomes unavailable for entry. The Amount field on the line becomes available for entry. The line amount that you enter becomes the shipping line price and amount. Amount only lines can have only one shipping line.
(Add/Edit Comments icon)	Click to access the Line Comments page, where you can record a comment or attach a file to this requisition line. The eProcurement role action of MULTI_COMMENTS determines what features are available on the Line Comments page.
VAT Amount (value added tax amount)	Displays the amount of value added taxes (VAT) for this requisition.
Recalculate Source	Click to have the system recalculate and update VAT amounts for the requisition.

Total	Displays the extended price for this requisition line, which the system calculates by multiplying the unit price by the quantity that you order.
Add to Favorites	Click to add selected items to the favorites list. A message appears confirming that the item has been added to the favorites list.
Add to Template(s)	Click to add selected items to a template. The Add Selected Items to Template(s) page appears, where you can select an existing template or create a new template.
Modify Line/Shipping/Accounting	Click to access the Modify Shipping/Accounting page, where you can change the shipping location, delivery date, quantity in the shipment, and so on. You can also change the accounting information for this requisition line.
Delete	Click to delete selected items from this requisition. You select items using the check box to the left of the item description.
Comments	Enter an comment for this requisition at the header level. This comment can be viewed in several places depending on the check boxes selected below this field.
Send to Vendor	Select if you want the header-level requisition comment recorded above to appear on the purchase orders that are dispatched to vendors. If the comment is for internal use only, leave the check box deselected.
Show at Receipt	Select if you want the header-level requisition comment recorded above to appear on the receipt documents.
Show at Voucher	Select if you want the header-level requisition comment recorded above to appear on the vouchers.
Approval Justification	Select if you want the header-level requisition comment recorded above to appear on the workflow approval pages for the approvers to review.
More Comments	Select to access the Header Comments page where you can enter additional comments for the header level of this requisition and also include one or more attachments to your comments. To view the More Comments link, your user ID must be connected to the eProcurement role action of MULTI_COMMENTS.
Check Budget	Click this button to initiate the Budget Processor and apply a pre-encumberance or encumberance for this requisition. This button only displays if Commitment Control has been enabled for PeopleSoft Purchasing and eProcurement. The requisition is automatically saved before the budget check is performed.

Pre-Check Budget	Click this button to initiate the Budget Processor and check the budget without reserving funds for this requisition. This option enables you to check whether a budget exists for this requisition before committing amounts to a pre-encumbrance or encumbrance. The requisition is automatically saved before the budget check is performed. The button only displays if:

- You have enabled commitment control for PeopleSoft Purchasing and eProcurement by selecting the Purchasing check box in the Enable Commitment Control group box on the Installation Options-Products page.

- You have enabled the *pre-check budget* feature, by selecting the Purchasing check box in the Enable Budget Pre-Check group box of the Installation Options-Commitment Control page.

Budget Checking Status	Displays the results of a budget check initiated by clicking the Check Budget button or the Pre-Check Budget button. The options are:

- *Valid:* The requisition passed budget checking and the Budget Processor has updated the control budget ledger (LEDGER_KK)

- *Not Checked:* The Budget Processor has not processed the requisition.

- *Error:* The requisition failed budget checking.

- *Provisionally Valid:* The requisition passed budget checking but no pre-encumbrance or encumbrance was created in the control budget ledger. This status is used when you select the Pre-Check Budget button.

- *Provisionally Error:* The requisition failed budget checking when you selected the Pre-Check Budget button.

Save & submit	Click to save the requisition and submit it for approval, sourcing, and dispatching to a vendor. It remains editable while the status is *Open* or *Pending.* When you click this button, the system displays the Confirmation page to inform you that the request has been successfully saved and provide summarized information about the request including the requisition ID and total price.
Save & preview approvals	Click to access the Confirmation page, where you can view requisition details and approvers.

Note. The approval monitor may not reflect the most current approver status until the requisition is actually saved and submitted.

Cancel Requisition	Click to cancel the entire requisition. The system displays a warning message before the cancellation.

Add Request Document   Click to access the Add a Document page, which provides information about the requisition. You must then select the document type that you want to use to create the document and respond to wizard questions concerning the new requisition document. A requisition document is one that contains responses to wizard questions. Contract specialists can use these responses to determine proper terms and conditions for a contract document when the requisition becomes a contract.

This link is available when PeopleSoft Supplier Contract Management has been installed and the application installation options have been set to use document types and to use documents with purchase order requisitions. You must also setup document types to use only with purchase order requisitions and must also be set up.

After you create the document, use the Modify Request Document link to update and edit the document.

See *PeopleSoft Enterprise Supplier Contract Management 9.1 PeopleBook*, "Defining Supplier Contracts," Adding Requisition Documents and Wizard Responses.

Find More Items   Click to access the Catalog page, where you can browse and search for additional items.

Cancel Changes   This button is active only if you have saved the requisition and have edited it to make changes. Click the Cancel Changes button to revert to the last previously saved version.

Reviewing and Modifying Requisition Line Information

Click the Expand Section icon on the Review and Submit page.

Review and Submit page: Requisition Lines Information group box

The requisition line section displays information that is specific to the expanded line.

Modify Shipping Address	From this link, you can elect to change the shipping address for this specific line. Click the Load Default Shipping Address button to revert back to the default shipping address.
	See Chapter 10, "Creat," Modifying Line, Shipping, and Accounting Information, page 269.
Maintenance WO	Associate a work order for maintenance repairs or service for the requisition line item.
Pegging Workbench	Use to link to items that are being received into an inventory business unit.
Add Shipto Comments	Select to access the Requisition Ship To Comments page where you can enter additional comments for the Ship To value on the shipment schedule level of this requisition and also include one or more attachments to your comments. To view the Add Shipto Comments link, your user ID must be connected to the eProcurement role action of MULTI_COMMENTS.
Accounting Lines	Use this section to create multiple ChartFields for a specific line.

See Also

Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39

Viewing Requisition Line Details

Access the Line Details page (Click the Line Details icon on the Review and Submit page).

Line Details page

Confirm requisition checkout information and edit additional details for a line, such as the buyer, vendor, and other line-specific information.

Line Status	Displays the status of the requisition line. The statuses include:

- *Approved:* The requisition line has completed workflow approval and is approved. The line is ready for sourcing.

- *Cancelled:* The requisition line was entered and saved but then canceled. A canceled requisition line can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently.

- *Complete:* The requisition line is marked complete after the line is dispatched on a PO, the goods are received and the vendor is paid. A background process identifies the requisition lines and moves them to the complete status. Canceled requisition lines and those that are fulfilled by inventory stock are also identified as complete.

- *Denied:* The requisition line has been denied in the approval process.

- *Open:* The requisition line has been entered and saved but not yet submitted.

- *PO(s) Created:* The requisition line has been placed on a PO that has been approved.

- *PO(s) Canceled:* The requisition line has been placed on a PO that has been subsequently been canceled.

- *PO(s) Dispatched:* The requisition line has been placed on a purchase order and the purchase order has been dispatched to the vendor.

- *Pending:* The requisition line has been submitted and is awaiting approval.

- *Received:* The requisition line has been placed on a purchase order, the purchase order has been dispatched to the vendor, and the goods have been fully received.

Item Details Group Box

The Item Details group box displays item information for this requisition line.

Merchandise Amt	Displays the vendor's unit price and currency for the item, which are assigned on the Vendor's UOM & Pricing Info (vendor's UOM and pricing information) page.
Category and **Description**	Displays the item category and the description of the item category from the Item Definition - General page.
Vendor	Displays the ID of the vendor that supply this item.
🔍 (Vendor Look Up)	Click the Vendor Lookup icon to access the Vendor Search page, where you can enter information to find a vendor.
Vendor Location	Displays the location of the vendor. The default is based on the value that is defined for the vendor.

Vendor Item ID	Displays the ID that the vendor uses to identify this item on the Item Vendor page.
Manufacturer ID	Identifies the manufacturer of the item. This value is supplied from the Vendor's Manufacturer Info page.
Manufacturer's Item ID	Displays the identifier that the manufacturer uses for this item when the suggested vendor supplies the item. This value appears from the Vendor's Manufacturer Info page.

Contract Group Box

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contacts with requisitions, purchase orders, and vouchers. As part of the contract functionality, you can set up requisitions to automatically search for a contract to use for requisitions. Applying default contract prices to requisitions enables you to receive contract prices for requisition items and to more accurately track budgets and pre-encumberance balances. Requesters, buyers, and administrators with the appropriate security can set to search for and use contracts on transactions at various levels.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Requisitions Online," Applying Contracts to Requisitions.

Contract ID	Displays the purchasing contract used to price this requisition line. You can enter or change a contract ID in this field or a default value can be applied by the system. In order to apply a default contract, you must select the Default Contract On Req check box on the Purchasing Definition - Business Unit Options page.
(Contract Search icon)	Click to access the Contract Search page (CNTRCT_SRCH), where you can perform advanced searches for contracts to be applied to this requisition line.
Use Contract If Available	Select this check box to: • Have the system use the contract ID that you have entered here in the Contract ID field. • Have the sourcing process find the best contract for this requisition line when you have left the Contract ID field blank. Un-select this check box to not use contract pricing for the requisition line. Un-selecting this check box deselects the Contract ID field and prevents the sourcing process from adding a contract. Note that un-selecting this check box after a default contract has already been applied does not change the applied price. The system assumes the current price is an override value and does not change it. If the item requires a contract (the Contract Required check box is selected on the Purchasing Attributes - Purchasing Controls page) then the Use Contract If Available check box on this page is selected and cannot be changed.
Category Line	Apply a contract category to this line item.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts."

Adding Comments to the Requisition Lines

Access the Line Comments page (Click the Comments icon on the Review and Submit page).

Line Comments page accessed by user without the MULTI_COMMENTS eProcurement role action.

Line Comments page accessed by user with the MULTI_COMMENTS eProcurement role action.

The user entering or changing this requisition can access one of two pages for line comments:

• Line Comments page (PV_REQ_COMMENTS) is displayed when the User ID is not linked to the eProcurement role action of MULTI_COMMENTS. This user is limited to one comment per requisition line.

• Line Comments page (PV_REQ_COMMENTS_NW) is displayed when the User ID is linked to the eProcurement role action of MULTI_COMMENTS. This user is can create multiple comments per requisition line. In addition, the user can copy standard comments and item specifications into this page. One or more attachments can be added to any comment.

⊞ (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.

Use Standard Comments	Click this link to access the Standard Comments page (PV_STD_COMM_SEC) where you can select a standard comment to be applied as a comment to this requisition line. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components.
	See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Setting Up Standard Comments.
Use Item Specifications	Select this link to access the Include Item Specifications page (PV_ITEM_SPEX) where you can select to include the item's specifications as a line comment. The item specifications are defined on the Item Specifications page (ITEM_SPEX_PUR) located in the item definition (Purchasing Attributes component). If item specifications have not been defined for the item on the the Item Specifications page, then the link does not display on this page.
	The item specifications are automatically included as a line comment if the Copy to Transactions check box has been selected on the Item Specifications page.
	See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining Purchasing Item Information," Entering Purchasing Item Specifications.
(Spell Check Comment icon)	Click to perform a spell check on the comment.
Add Attachments	Click to access the File Attachments window where you can browse and select a file to be attached to this comment. Mulitple files can be attached to one comment. Once a file is attached, the Attachments group box displays the file details including file name, the user who attached it, and the date/time it was attached. The Send Vendor check box applies to each file separately.
Send to Vendor	Select if you want the corresponding comment to appear on the purchase order that is dispatched to the vendor. Attachments can be sent with the purchase order. If the comment or attachment is for internal use only, leave the check box deselected.
Show at Receipt	Select if you want this comment to appear on the receipt documents.
Show at Voucher	Select if you want this comment to appear on the voucher.
OK	Select the OK button to return to the Review and Submit page with the comments and attachments that you have added on this page.
Cancel	Select the Cancel button to return to the Review and Submit page without saving the changes added to this page.

Modifying Line, Shipping, and Accounting Information

Access the Modify Line/Shipping/Accounting page (Click the Modify Line/Shipping/Accounting button on the Review and Submit page).

Modify Line/Shipping/Accounting page

The requisition line number that you selected on the Review and Submit page appears for you to work with.

Vendor ID	Change the vendor for this specific line. When you click the Apply button, the vendor ID replaces the data on the selected lines.
Vendor Location	Change the vendor location for this specific line. When you click the Apply button, the vendor location replaces the data on the selected lines.
Buyer	Change the buyer for this specific line. When you click the Apply button, the buyer replaces the data on the selected lines.
Category	Change the category for this specific line. When you click the Apply button, the category replaces the data on the selected lines.
Ship To	Review or change the ship to location code. This code identifies the shipping address for this request.
Due Date	Review or change the arrival date of this shipment. The date that you enter here is a suggested date. When the purchase order is created, the system or buyer attempts to meet this date or changes it to a realistic due date.

Modify Shipping Address	Select this link to access the Shipping Address Default page where you can enter a shipping address that is not currently defined in the system as a ship to location. The system uses this feature for shipments to a location that will not be used again, for example, shipments to a construction site or other temporary location. Click OK to save the address.
	This link is not available if the user is linked to the eProcurement role action of NO_ONETIME_SHIPTO.
Attention	Enter the name of the individual who should receive the items or services. Once the shipment is received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the vendor.

Accounting Information group box

Use this section only if you need to change the accounting information for the selected requisition lines. The default structure is derived from the user profile, the item category, and the Define Requisition page.

Select the appropriate values for the requisition line if you must deviate from the default accounting structure.

Note. The ChartField values on the tabs; *Chartfields1, Chartfields2,* and *Chartfields3* are described further in the preface of this PeopleBook.

Asset Information Tab

Select the Asset Information tab.

Asset Information tab

AM Business Unit	Identify the Asset Management business unit that is responsible for tracking asset transactions.
Profile ID	Select a value that represents the default value from the Item Categories - Category Definition page. An asset profile ID on a purchase order, in conjunction with an asset business unit, indicates that PeopleSoft Asset Management is to be notified of the purchase of this item when it is received. To access the Category Definition page, select Items, Define Controls, Item Categories, Category Definition.
Capitalize	Select to indicate that the requisition item is capitalized.

Cost Type	Select the asset cost type, such as materials, labor, and overhead. Cost types are used with asset category and transaction codes to determine into which accounts the costs are entered in the general ledger.
Load Values from Defaults	Click this link to complete the fields with new default information after you add defaults on the Define Requisition page,

Changing Distribution Information

Access the Distribution Change Options page (After entering changes in the Accounting Information group box of the Modify Line/Shipping/Accounting page, click the Apply button).

Distribution Change Options

For the selected requisition lines, apply distribution changes to

◉ All Distribution Lines

    Apply changes to all existing distribution lines.

○ Matching Distribution Lines

    Apply changes to each existing distribution line by matching the distribution line numbers.

○ Replace Distribution Lines

    Remove the existing distribution lines and replace with the distribution lines changes.

[OK] [Cancel]

Distribution Change Options page

When changing distribution information, you must click the Apply button, which displays the Distribution Change Options window. The options that appear in this window are dependant on the changes that you make. Select one of the following options, and click the OK button to apply the change.

All Distribution Lines	Select to apply changes to all existing distribution lies.
Matching Distribution Lines	Select to apply changes to each existing distribution lines by matching the distribution line numbers.
Replace Distribution Lines	Select to remove the existing distribution lines and replace them with the distribution line changes.

Maintaining Value Added Tax Details for Shipping Lines

Access the Maintain Requisitions - VAT Information for Schedule page (Click the Shipping VAT button on the Review and Submit page).

Use this page to make adjustments to VAT shipping details. Information that appears on the page relates to the item on the line number of the requisition and the shipping line that you selected on the Review and Submit page.

Before you can review VAT details on this page, make sure that you are an administrator:

1. Define VAT default value settings for the business unit.

    To access the field, select eProcurement, Administer Procurement, Maintain Business Units, Processing Options, and click the VAT Default link.

2. Select the Calculate VAT on Req (calculate value added tax on requisition) check box.

    To access the check box, select eProcurement, Administer Procurement, Maintain Business Units, Purchasing Definition, Business Unit Options.

3. Assign the user role action *VAT Details* to the role name.

    To access the check box, select eProcurement, Administer Procurement, Maintain System Users and Roles, eProcurement Role Action, select *VAT Details* as the Action Name, and add the user role for the role action.

    See Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39.

4. Select the View/Override VAT Details check box to authorize a requester to view and update VAT information.

    To access the check box, select eProcurement, Administer Procurement, Maintain Procurement Users, User Preferences, click the Procurement link, and then click Requisition Authorizations.

5. (Optionally) Select a value in the Allow Override Recovery/Rebate field to enable a requester to override system-created VAT recovery and rebate percentage values.

    To access the field, select eProcurement, Administer Procurement, Maintain Business Units, Processing Options, click the VAT Default link, and select a value.

    Values include:

    *   *Do Not Allow Override.*

    *   *Override Both Recovy/Rebate %* (override both recovery and rebate percentages).

    *   *Override Rebate % Only* (override rebate percentage only).

    *   *Override Recovery % Only*(override rebate percentage only).

Line	Displays the line number to which VAT information on this page pertains.
Schedule	Displays the schedule number from the requisition.

Return to Schedule Page Click to access the Review and Submit page, where you can update shipping information.

Physical Nature Displays whether the requisition is for goods or services. This is determined by the type of requisition that you created.

VAT Locations

Ship From Country Select the seller's country from which the requisition item for this line is to be shipped.

Ship From State Select the state, province, or area from which the item is to be shipped.

Ship to Country Displays the buyer's country where the item is being shipped. You define this value on the shipping address.

Ship to State Displays the state, province, or area where the item is being shipped. You define this value on the shipping address.

VAT Defaults

Reporting Country Select the VAT registration country in which this transaction takes place.

Defaulting State Select the state for recording VAT details.

Vendor Registration Country Select the VAT registration country in which the seller does business.

Vendor Registration ID Enter the VAT registration identifier for this vendor.

Exception Type Select a value to indicate that an exception to the VAT was issued. Exception values are *None, Exonerated,* and *Suspended.*

Certificate ID Enter a certificate ID if an exception was issued for the VAT.

Calculate at Gross or Net Select to calculate the VAT. Values include:

Net: When this option is selected, the early payment discount is applied to the goods amount before the VAT is calculated. The amount of VAT that is calculated using this method is the amount that is to be paid, regardless of whether the early payment discount is actually taken at the time of payment.

Gross: When this option is selected, the VAT is initially calculated based on the gross transaction amount. The early payment discount is not taken into account at this point. However, in some countries an adjustment is made to the VAT amount at the time of payment if the early payment discount is taken.

Recalculate at Payment Select to have the system recalculate VAT at the time of payment if a discount has been taken. This field value appears by default from the VAT entity.

If the Calculate at Gross or Net field value is *Gross,* the check box is selected. If the field value is *Net,* the check box is deselected.

Include Freight Select if the freight amount needs to be taxed. The system adds the freight amount to the gross or net amount before calculating VAT. This setting appears by default from the VAT entity.

Include Miscellaneous Select if miscellaneous charges need to be taxed. The system adds the miscellaneous charges to the gross or net amount before calculating VAT. This setting appears by default from the VAT entity.

Declaration Point Select when to declare VAT. Values are:

Delivery: Declares VAT when shipments are received.

Invoice: Declares VAT when a transaction is invoiced.

Payment: Declares VAT when payment is tendered

Rounding Rule Select the rounding rule for VAT amounts. Values are:

Natural Round: Amounts are rounded normally (up or down) to the precision that is specified for the currency code.

Up: Rounds up and limits rounding precision to one additional decimal place.

Down: Rounds down.

Rounding only affects VAT amounts, the currency numbers stored in the system, and how currency numbers are printed on reports.

Apply Domestic Reverse Charge Select if this country requires the use of the domestic reverse charge provision.

Use Type Determines VAT recoverability. The field value is retrieved from the VAT default hierarchy, but you can override this value.

Use type is a type of activity in which a purchased good or service is to be used, and therefore, you use it to determine a recoverability percent and a rebate percent (when applicable) that is to be applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you can associate either the ratio of taxable activity to exempt activity directly with the use type, or you can indicate that this ratio is determined at the ChartField level.

Treatment	Select a value that controls VAT default and transaction behavior. It is a description of how the transaction must be treated for VAT purposes. This is used to determine how VAT defaults are applied, what accounting entries are required, and how and whether the transaction is reported on the VAT return. You can override the value in this field.

Values are:

Domestic Goods Purchase

Domestic Service Purchase

EU Goods Purchase (European Union goods purchase)

EU Service Purchase (European Union service purchase)

No VAT Processing

Outside of Scope

Self-Assess Goods Import

Self-Assess Service Import

Zero-Rated Goods Import

Applicability	Select whether VAT should be calculated for this schedule. While most requisitions may be subject to VAT for any VAT countries, some items or item categories may be exempt or outside of scope for VAT. You can override the default value here.
VAT Code	Select the tax code that is used to define a percentage that the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions.
	The tax authority that is associated with the VAT code generally consists of a single authority, and the ChartFields for a VAT code don't reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.
Record Output VAT	Select to have tax for this transaction charged on the supply of goods or services. You may want to select this check box for drop shipments.
Tax Rate	Displays the rate at which this item is taxed.
Transaction Type	Select a value to categorize VAT transactions according to particular VAT accounting and reporting requirements. The system uses the VAT code and transaction type in conjunction with the VAT account type to obtain the ChartFields for accounting entries.
Adjust Affected VAT Defaults	Click to adjust the VAT defaults on this page that are affected by changes that you have made on the page. Changes that you have made to the defaults that affect other VAT defaults are retained.

Levels	Displays the level of information (obligation) that intracommunity sales and purchases require. This information is used mainly in France to reduce the declarative workload for small- and medium-sized industries. PeopleSoft delivers the Intrastat form with the most restrictive level (Level 1), which covers all levels of obligation. This is an informational field that determines the level that is checked on certain Intrastat reporting forms.
Reset All VAT Defaults	Click to reset all the VAT defaults. Changes that you have made to VAT defaults are reset to their original values.

See Also

PeopleSoft Enterprise Global Options and Reports 9.1 PeopleBook, "Working with VAT"

Adding Comments at the Requisition Header Level or Ship To Level

Both the Header Comments page and the Requisition Ship To Comments page use the same fields. Navigation is different and each page adds comments and attachments to a different part of the requisition.

Access the Header Comments page (click the More Comments link on the Review and Submit page) or access the Requisition Ship To Comments page (click the Edit Shipto Comments link on the Review and Submit page).

Header Comments page

Requisition Ship To Comments

Business Unit:	US100	Requisition Date:	07/12/2009		
Requisition ID:	NEXT	Status:	Pending	Ship To:	US001

Comments   Find   First ◄ **1-2 of 2** ► Last

Use Standard Comments   Entered On: 07/12/2009 5:19:11PM   ➕ ➖

1 Please deliver between the hours of 8am and 4pm, Monday to Friday.

☐ Send to Vendor   ☐ Show at Receipt   ☐ Show at Voucher

[Add Attachments]

▽ Attachments

	Attached File	User/Date Time	View	Send to Vendor	
1	Assembly_Instructions.doc	CHRISBAKER2009-07-12-17.19.31	[View]	☐	➖

Use Standard Comments   Entered On: 07/12/2009 5:35:03PM   ➕ ➖

2 Please notify us prior to delivery for over-sized deliveries.

☐ Send to Vendor   ☐ Show at Receipt   ☐ Show at Voucher

[Add Attachments]

[OK]   [Cancel]

Requisition Ship To Comments page

➕ (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.
Use Standard Comments	Click this link to access the Standard Comments page (PV_STD_COMM_SEC) where you can select a standard comment to be applied as a comment to this requisition. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Setting Up Standard Comments. |
| (Spell Check Comment icon) | Click to perform a spell check on the comment. |

Add Attachments	Click to access the File Attachments window where you can browse and select a file to be attached to this comment. Mulitple files can be attached to one comment. Once a file is attached, the Attachments group box displays the file details including file name, the user who attached it, and the date/time it was attached. The Send Vendor check box applies to each file separately.
Send to Vendor	Select if you want the corresponding comment to appear on the purchase order that is dispatched to the vendor. Attachments can be sent with the purchase order. If the comment or attachment is for internal use only, leave the check box deselected.
Show at Receipt	Select if you want this comment to appear on the receipt documents.
Show at Voucher	Select if you want this comment to appear on the voucher.
Approval Justification	(Header comments only) Select if you want this header comment to appear in the workflow approval pages to be viewed by the requisition approvers and reviewers. The first comment on the Header Comments page is the only one that can be viewed during the approval process. This first comment is populated by any header comment on the Review and Submit page. In addition, if the header comment on the Review and Submit page is blank, then the first comment on the Header Comments page populates it.
OK	Select the OK button to return to the Review and Submit page with the comments and attachments that you have added on this page.
Cancel	Select the Cancel button to return to the Review and Submit page without saving the changes added to this page.

Confirming Requisition Checkout Information

Access the Confirmation page (Click the Save and Preview Approvals button on the Review and Submit page).

Confirmation

Requested For:	Chris Baker	Number of Lines:	2
Requisition Name:	0000000056	Total Amount:	1,310.45 USD
Requisition ID:	0000000056		
Business Unit:	US100		
Status:	Pending		
Priority:	Medium		
Budget Status:	Not Checked		

Confirmation page (1 of 3)

Commodity/Category Approval

Line 2: Pending
CPU - 300MHz

View/Hide Comments
Start New Path

Route to Hardware Approver

Skipped
Chris Baker
Hardware Buyer
10/07/09 - 01:24 PM

Pending
Multiple Approvers
Hardware Buyer

Pending
Multiple Approvers
Hardware Buyer

Reviewer
Supply Contract Administrator
Reviewer

Reviewer
Supplier Contract Approver
Reviewer

Reviewer
Brenda Arden
Reviewer

Reviewer
John Avery
Reviewer

Comments

Confirmation page (2 of 3)

Fiscal Approval

Requisition 0000000056: Awaiting Further Approvals
Start New Path

Route to Supervisors

Not Routed
Wendy Cho
Supervisor by UserID

Not Routed
Anita Gardner
Supervisor by UserID

Submit   Edit Requisition   Apply Approval Changes   Check Budget   Pre-Check Budget

View printable version   Manage Requisitions   Create New Requisition

Confirmation page (3 of 3)

The Confirmation page displays basic information about the requisition and the number of items that it contains. It appears when you either submit a requisition or save it for later use.

Requested For	Displays the name of the person requesting these materials or services. This can be your name or you can purchase on behalf of another person. For you to purchase on behalf of another user, these requesters must be defined on the User Preferences page.
Number of Lines	Displays the number of lines on this requisition.
Requisition Name	Displays a description of the request to help you identify this requisition as it flows through the system. If this field is left blank, the system uses the requisition ID as the name.
Business Unit	Displays the PeopleSoft Purchasing business unit that holds this requisition.
Status	Displays the status of a requisition. Values are *Open, Pending, Approved,* and *Complete.*
Priority	Displays the priority of the requisition. The values are *Low, Medium,* or *High.*
Budget Status	If the Commitment Control feature is turned on, then this field displays the current budget checking status for this requisition.
Change Request/Line Approval Summary (group box)	This group box displays if you have changed an existing requisition. Each changed line in the requisition is displayed in this grid with any change request created for the line and the current workflow approval status. See Chapter 16, "Changing Requisitions and Using Change Requests," Confirming Requisition Changes, page 450.
Approval group boxes	If the Approval Framework is enabled for this business unit and this requisition requires approval, then the approval group boxes are displayed. These group boxes enable you to see the approval process. For more information on using the approval feature, see the Using the Approval Framework in PeopleSoft eProcurement chapter of this peoplebook. See Chapter 15, "Using the Approval Framework in PeopleSoft eProcurement," Performing Approval Tasks for Requisitions, page 418.
Requisition Line(s), To. and **Retrieve**	Use the Requisition Line(s) field and To field to enter a range of lines to view within the approval group box. These chunking fields are displayed if you have selected the Display Approval Chunking check box on the eProcurement Installation Options page.
Submit	Click to submit requisition for further processing.
Edit Requisition	Click to access the Edit Requisition page, where you can make changes to the requisition and submit it again.
Apply Approval Changes	If you have added adhoc approvers or adhoc reviewers to this requisition, then click this button to save your approval changes. To have the authority to add adhoc approvers and reviewers, your user role must be linked to the ALLOW_ADHOC_ONPREVW and ALLOW_ADHOC_ONSUBMIT eProcurement role actions.

Check Budget	Click this button to initiate the Budget Processor and apply a pre-encumberance or encumberance for this requisition. This button only displays if Commitment Control has been enabled for PeopleSoft Purchasing and eProcurement. The requisition is automatically saved before the budget check is performed.
Pre-Check Budget	Click this button to initiate the Budget Processor and check the budget without reserving funds for this requisition. This option enables you to check whether a budget exists for this requisition before committing amounts to a pre-encumbrance or encumbrance. The button only displays if:

- You have enabled commitment control for PeopleSoft Purchasing and eProcurement by selecting the Purchasing check box in the Enable Commitment Control group box on the Installation Options-Products page.

- You have enabled the *pre-check budget* feature, by selecting the Purchasing check box in the Enable Check without Reserve group box of the Installation Options-Commitment Control page.

View a printable version	Click this link to review an online requisition that shows the layout of the printed version. The requisition opens up as a second window and can be printed. The Oracle XML Publisher is used to generate this report and you can customize it. You can choose to display this report with or without the distribution details.
Manage Requisitions	Click to go to the Manage Requisitions component, where you can further process the requisition.
Create New Requisition	Click to add a new requisition.
Return to Approve Requisition	Click this link to return to the Requisition Approval page. This link is only available is you entered this component using the Edit Requisition button on the Requisition Approval page and the approval workflow framework is not restarted for your changes to the requisition. In order to make changes to the requisition without re-initiating workflow, your user ID must be linked to the appropriate eProcurement role action; these actions include, CANCHANGEALL, CANCHANGEHEADER, CANCHANGELINE, CANCHANGESCHEDULE, or CANCHANGEDISTRIB.

Chapter 11

Using Special Requests and Express Forms to Create Requisitions

This chapter provides an overview of special requests and express forms and discusses how to:

* Request special items.

* Request special services.

* Create express forms.

* Order items from express forms.

* Use express requisitions.

Understanding Special Requests and Express Forms

This section provides overviews of special requests, express forms, and express requisitions.

Special Requests

To create a requisition for an item that is not included in the standard catalog of items in PeopleSoft eProcurement and has no item ID, you can enter a special request. After you submit the requisition, the special request item is routed for approval.

When you enter a special request in the Special Request component, specify the type of item that you are requesting. This enables the system to tailor the fields to match the needs of the item.

You can request two types of items:

* Special items, which are physical items.

* Services, which are tasks that are performed by outside agents. For example, package, delivery, temporary help, and repair work.

Note. If you know the PeopleSoft item ID, use the Search Catalog page to request the item.

Using a Negative Price on Special Request Pages

You can create a special request item or service with a negative price. This feature enables you to record trade-in items or special discount offers such as instant rebates and special coupon offers. You can enter a negative price item within PeopleSoft Purchasing and PeopleSoft eProcurement; however, negative prices cannot be entered in PeopleSoft Services Procurement. Using the Special Requests pages in PeopleSoft eProcurement, you can enter the negative value in the following fields:

• The Price field on the Special Item page.

• The Value of Service field on the Special Request - Fixed Cost Service page.

• The Rate field on the Special Request - Variable Cost Service page.

• The Rate field and the Price field on the Special Request - Time and Materials page.

A requisition with a negative price item can be sourced to a purchase order and dispatched to a vendor, then the items can be received into PeopleSoft eProcurement. When using a negative price item, the following points apply:

• The total price amount of the requisition can be negative or you can just have one or more requisition lines with negative prices.

• The Vendor ID is not a required field when entering a negative price item.

• You cannot source a requisition containing a negative price item to PeopleSoft Inventory. You can only source to a purchase order. In other words, on the REQ_LINE, the INVENTORY_SRC_FLG is set to the value of *N* (no) and disabled.

• A negative price item cannot be sourced into a request for quote (RFQ) or to PeopleSoft Strategic Sourcing.

• A negative price item cannot be partially sourced. The item quantity cannot be split into multiple lines and sourced separately.

• When the PO Calculations process (PO_POCALC) is run, a requisition line containing a negative price item is not repriced to match the system price or consolidated with other requisitions. In other words, on the REQ_LINE, the CALC_PRICE_FLG and the CONSOLIDATE_FLG are both set to the value of *N* (no) and disabled.

• Contract pricing is not applied to a requisition line with a negative price.

• The price tolerance fields are disabled so that a requisition containing a negative price item is not rejected. These field are Tolerance/Tolerance Under, % Unit Price Tolerance, and Unit Price Tolerance.

Negative price items can be added to the favorites list or a personal template to be used again on another requisition. In addition, you can copy a requisition with one or more negative price items using the copy action on the Manage Requisition page.

Express Forms

Express forms enable employees to use a standardized form to order products that might need additional supporting information. For example, when ordering business cards, you must give the name, job title, phone number, and other information that varies by individual but would follow the same format.

You design the express form page that employees use by creating a record definition with the specific fields for that product. You can have as many express forms as you need. For example, you might design one express form for business cards and another for catering services. You can also use inquiry versions of the forms to display orders without allowing editing.

When the requester selects an express form for the requisition, a page appears where he can enter additional information that is needed to order the item. The requester completes this page, and the information is saved for the vendor.

Vendors can access the purchase order (PO) by using PeopleSoft eSupplier Connection. Using the application, they can access the PeopleSoft database and view the POs and the actual express form.

Express Requisitions

Express requisitions enable requesters to enter information that the system uses to populate a delivered express form. This express form appears as a blank form if the default information is not supplied by the requester. The requester can either create a set of default information that is used to populate fields, or complete each field manually. Requesters wanting to simplify the amount of repetitive data can set up the requisition with the default information. Requesters who prefer to follow a structured head-down approach can leave the fields blank.

Common Elements Used in This Chapter

# of Units of Work (number of units of work)	Enter the time that is needed to complete service based on the unit of work. For example, 2 hours or 6 days.
Add Item	Click to save data that is entered as a requisition line.
Beginning Date	Enter the date that the service should be started. This date appears in the Line Comments sections on the requisition and the purchase order.
Category	The item category to which this item or service belongs. This category ID enables the system to retrieve default values for the requisition and purchase order.
Date of Completion	The date that the services should be completed. This date appears in the Due Date fields on the requisition and the purchase order.
Forms	Select to access the express forms that have been defined for use.
Item Description	A brief description of the item that is needed. This description appears on the purchase order that is sent to the vendor.
Additional Information	Enter additional information that help describe or support a special request. Determine whether this additional information are sent to the vendor, printed on the receipt, or printed on the voucher.
Price	The unit cost of the item based on the currency used. This price can be a negative value on the Special Item page.

Quote Date	The date of the written quote from the vendor. This date appears in the Line Comments sections on the requisition and the purchase order.
Quote Number	The number of the written quote, if any, that is provided by the vendor. This number appears in the Line Comments sections of the requisition and the purchase order.
Rate	The unit price for this service based on the unit of work. This rate can be a negative value on the Special Request - Variable Cost Service page or the Special Request - Time and Materials page.
Send to Vendor	Select to send the additional information that you entered to the vendor.
Service Description	A brief description of the service that is needed (up to 254 characters). This description appears on the purchase order that is sent to the vendor.
Show at Receipt	Select to display the additional information that you entered on receipt.
Show at Voucher	Select to display the additional information that you entered on the voucher.
Special Request	Select this tab to access a list of special requests for goods and services.
Unit of Measure	Enter the default unit of measure for this express form item. This is used on the requisition.
Units of Work	The time-based unit of measure that is used for the service that is provided, for example, hour or day.
Value of Service	Enter the cost of this service. This amount is saved on the requisition line with the quantity *1* and the unit of measure *Each.* This cost can be a negative value on the Special Request - Fixed Cost Service page.
Vendor ID	Enter the identification number of the vendor of this item. The vendor ID is from the PeopleSoft vendor tables. You can enter a partial value and select the Vendor Lookup icon (magnifying glass) to access the Vendor Search page where you can select the correct vendor.
Vendor Name	Enter the vendor name or partial name to search for the vendor, then select the Vendor Lookup icon (magnifying glass) to access the Vendor Search page where you can select the correct vendor.
Vendor Lookup	Click to access the Vendor Search page, where you can search for and suggest a particular vendor. If you do not name a vendor, the buyer can add one later.

Requesting Special Items

This section discusses how to add a special request for items to a requisition.

Page Used to Request Special Items

Page Name	Definition Name	Navigation	Usage
Special Item	PV_REQ_SR_GOOD	eProcurement, Create Requisition Click the 2. Add Items and Services link and select the Special Request tab. Click the Special Item link.	Add a special request for items not found in the item catalog to a requisition.

Adding a Special Request for Special Items to a Requisition

Access the Special Item page (eProcurement, Create Requisition. Click the 2. Add Items and Services link and select the Special Request tab. Click the Special Item link).

Special Item page

Use this page to order goods that are not listed in a catalog.

Request New Item	Select this check box to request that the item be added to the item master. When this option is selected, a request new item worklist notification is sent based on the following conditions:

- If workflow approval is required and the requisition is approved, a worklist notification is sent to all users that have the Item Notification (ITEM_NOTIFICATION) role action.

- If workflow approval is not required and the requisition is saved and submitted, a worklist notification is sent to all users that have the Item Notification role action.

When the requisition is saved and submitted, the status of the new item request appears in the Request New Item group box and has a value of *Pending*.

The authorized user can approve or reject the item request by using the eProcurement New Item Request page. When the new item request is approved, the set ID and the item ID are specified on the eProcurement New Item Request page. The requester receives an email notification when the item is created or rejected and the status changes to *Created* or *Denied.*If the new item request is approved, the set ID and the item ID are included on the email notification.

See Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39.

See Chapter 4, "Determining Functional Implementation Options," Defining Business Unit Options for PeopleSoft eProcurement, page 73.

See Chapter 4, "Determining Functional Implementation Options," Pages Used to Maintain Items, page 83.

Add Item	Click this button to add the special item that you have entered to the requisition.

See Also

Requesting Special Services

This section discusses how to:

- Request a fixed-cost service.

- Request a variable-cost service.

- Request a time and materials form.

Pages Used to Request Special Services

Page Name	Definition Name	Navigation	Usage
Select a Request Type	PV_REQ_SPECIALREQ	Procurement, Create Requisition Click the 2. Add Items and Services link. Select the Special Request tab.	Define what type of special request to create.
Special Request - Fixed Cost Service	PV_REQ_SR_SVC_FC	Click the Fixed Cost Servicelink on the Select a Request Type page.	Request a fixed-cost service. This is a service with a fixed fee and is not part of the standard item catalog for PeopleSoft eProcurement.
Special Request - Variable Cost Service	PV_REQ_SR_SVC_TL	Click the Variable Cost Service link on the Select a Request Type page.	Request a variable-cost service that is based on the number of hours of work.
Special Request - Time and Materials	PV_REQ_SR_SVC_TM1	Click the Time and Materials link on the Select a Request Type page.	Request a time and materials form for services.

Requesting a Fixed-Cost Service

Access the Special Request - Fixed Cost Service page (Click the Fixed Cost Servicelink on the Select a Request Type page).

Special Request - Fixed Cost Service page

This type of service is a one-time event for a flat rate.

Requesting a Variable Cost Service

Access the Special Request - Variable Cost Service page (Click the Variable Cost Service link on the Select a Request Type page).

Special Request - Variable Cost Service page

This type of service is a contractual agreement that is based on the number of hours of work. For example, the cost to hire temporary help is usually based on the hours worked.

The number of hours on this page is an estimate. The total price is uncertain until the job is complete. For example, the cost to hire temporary help is usually based on the hours worked.

Requesting a Time and Materials Form

Access the Special Request - Time and Materials page (Click the Time and Materials link on the Select a Request Type page).

Special Request - Time and Materials page (1 of 2)

Special Request - Time and Materials page (2 of 2)

This type of service is a contractual agreement that is based on the number of hours worked and the materials used, for example, expenses that include parts and labor for equipment repairs.

After you have completed the first page of the Time and Materials form, click Continue to go to the second page.

See Also

Creating Express Forms

To create express forms, use the Express Form Profile component (PV_EXP_APP_PROFILE).

This section provides an overview of how to create express forms and discusses how to link express forms to PeopleSoft eProcurement.

Understanding How to Create Express Forms

To create an express form:

1. Create a record definition in PeopleSoft PeopleTools with all the fields that you want on the express form.

   This record definition is created for a PeopleSoft application. The definition is made up of a rowset name and a record name and a group of child records that make up the fields for the express form page that users access to order forms. You can also hard code values into the rowset.

   The rowset name must be named &RS_REQ_ITEMS and the record must be named PV_EXT_ITEM_WRK. Required fields for the record include:

   • PRICE_REQ.

   • QTY_REQ.

   • CURRENCY_CD.

   • UNIT_OF_MEASURE.

   • CATEGORY_ID.

   • DESCR254_MIXED.

2. Use a subpanel with the required fields to enter a requisition. It is attached to the record definition from step 1.

   Enter a default value for these required fields to be used if the requester does not enter a different value.

3. Build the SQL table from the record definition and create the page definition.

   This defines the fields and layout of the express form itself. Enter all of the fields that you want the user to be able to complete. Be sure to include quantity and amount fields.

4. Copy the page that you just created and save it as an inquiry page.

   The sample business card express form uses the PV_EF_BUSCARD_INQ record. This provides a display-only page for the express form. Records that you create can be edited only by appropriate users and at appropriate points in the procurement process. To access the page, select eProcurement, Procurement Application Admin, Maintain Supplier Integration, Inquire Business Cards.

5. Define the component definition.

   The business card express form example uses PV_EF_BUSCARD.

6. Copy the page that you created and save it as an inquiry component.

7. Add the two components to an existing menu definition.

   The sample business card express form uses the menu name PV_MAIN_MENU.

8. Use the Express Form Type page to link the express form to the PeopleSoft eProcurement user interface.

   To access the page, select eProcurement, Procurement Application Admin, Maintain Supplier Integration, Maintain Express Form Profile. Make sure that you select the Activated? check box to activate the express form.

9. Enable the catalog type for the express form catalog type to establish a security setting for express forms.

   Use the Catalog Types page to enable express form security. To access the page, select eProcurement, Procurement Application Admin, Maintain Catalogs, Catalog Types and select the Enable check box.

10. Enable menu security using permission list, roles, and user profiles.

    Express form is a type of catalog security. You must explicitly give permission to users for them to access and use express forms. Also, you must assign catalog security to a business unit. To assign catalog security, select eProcurement, Procurement Application Admin, Maintain Business Units, eProcurement Business Unit Actions, select EXPRESSFORM_SECURITY, and then select the business unit to which you want to apply the security.

11. Test the new express form to ensure online functionality and data integrity by adding data to the express form and confirming default values and prompt lists.

    The ChartField should appear as a default from the setup in step 2. The account usually comes from the item category definition.

12. To retrieve the express form in an item search or browse during requisition entry, define the express form search using the rule-based catalog maintenance feature.

After you add an express form to a requisition, the information that you enter appears as line comments for approvals and reviews. This example illustrates how information that you enter for an express form appears in a requisition.

Requisition Details

Requisition Name	Requisition ID	Unit	Date	Status	Total
0000000070	0000000070	US100	07/17/2009	Approved	50.00

Line Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1 Business Cards	Available	N	1,000.0000 Each	0.05000 USD	Approved	50.00

Line Comments:

Comments 1: << Business Card Details: KELLYJONES,KELLYJONES,188 Main Street,,San Francisco,,peoplesoft@peoplesoft.com,510-345-6789,,,USA,CA,Kelly Jones,,94114 >>

Example of line comments for express forms

Note. Line comments are not updated if you make changes to the express form; however, the application class records the changes and makes them available to suppliers who use the line comments to produce the express form.

See Also

PeopleSoft Enterprise Managing Items 9.1 PeopleBook, "Defining Item Control Values"

Enterprise PeopleTools 8.50 PeopleBook: Security Administration

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Application Designer

Page Used to Create Express Forms

Page Name	Definition Name	Navigation	Usage
Express Form Type	PV_EXP_APP_PROFILE	eProcurement, Administer Procurement, Maintain Supplier Integration, Maintain Express Form Profile	Link express forms to PeopleSoft eProcurement.

Linking Express Forms to PeopleSoft eProcurement

Access the Express Form Type page (eProcurement, Administer Procurement, Maintain Supplier Integration, Maintain Express Form Profile).

Express Form Type:	BCRD			

Merchant Information   Find | View All First ◄ **1 of 1** ► Last

*Effective Date:	01/01/2000 📅	☑ Activated?		➕ ➖
*Description:	Business Cards			
Vendor SetID:	SHARE 🔍			
Vendor ID:	USA0000017 🔍	Vendor Location:	🔍	
SetID:	SHARE 🔍	Category ID:	00001 🔍	
Unit of Measure:	EA 🔍	Currency Code:	USD 🔍	
*Menu Name:	PV_MAIN_MENU			
*Component Name:	PV_EF_BUSCARD			
*Page Name:	PV_EF_BUSCARD			
Inquiry Menu Name:	PV_MAIN_MENU			
Inquiry Component:	PV_EF_BUSCARD_INQ			
Inquiry Page Name:	PV_EF_BUSCARD_INQ			
Image Name:	PV_CARD_SMALL			
Contact Name:	Joe Smith			
Search Keywords:	BUSINESS CARDS PRINTING			
Description:	Order customized company Business Cards			
Role Action Security				

Return to Administer Procurement

Express Form Type page

Use this page to link record definitions for express forms to the PeopleSoft eProcurement system. Define the page, menu, and component for the express form for both editable and inquiry-only versions. You can create different express forms for different uses and effective dates.

All fields from Effective Date through Page Name are required.

Note. The business card form is provided as an express form example, but it is not intended to be an express form template.

Effective Date   Defines the date on which the form is to be valid for use with PeopleSoft eProcurement.

Activated?   Select to indicate that this form is available for use.

Menu Name   Enter the menu definition for the express form page. Use this field to link the requisition Search Catalog page to the location of the express form. The menu, component, and page elements are part of a hierarchy in whcih each layer further defines parts of the menu.

Component Name   Enter the name of the component where the express form is located.

Page Name   Enter the record definition that you created for the express form.

Inquiry Menu Name   Enter the name of the inquiry menu definition that is used by this express form page for inquiries. Use this field to link the item description links to the location of the express form inquiry. You can view express forms using the Inquire Business Cards page. To access the page, select eProcurement, Procurement Application Admin, Maintain Supplier Integration, Inquire Business Cards.

Inquiry Component   Enter the component for express form inquiries.

Inquiry Page Name   Enter the record definition that is used for express form inquiries.

Image Name   Enter the file name of the image that you want to display on the requisition Search Catalog page for this express form.

Contact Name   Enter the contact person for this order.

Search Keywords   Enter a string of characters that can be used to search for this form. The system uses a space between strings to distinguish what makes up a string.

Role Action Security   Enter the eProcurement role action. The system uses this to further define access to the express form.

Note. More than one express form can use the same page definition but not the same express form type.

Note. Use the inquiry or display-only version of the express forms to enable users and vendors to view orders without editing them.

You can also enter search terms and a description that helps users find the express form during searches of the catalog.

Ordering Items from Express Forms

PeopleSoft eProcurement is delivered with an express form example of business cards. While the example can be used to design express forms, it is not intended to be used as an express form template.

To order express form items:

1. Create or edit a requisition.

2. Access the Find Items page, and select Forms.

3. Click the link for the type of form that you want to order.

4. Enter information for the form.

    Fields that are marked with an asterisk (*) are required.

5. Click OK to save the request and access the Requisition Checkout page.

6. After adding the form to the requisition, click the description for the linked item on the Requisition
    Checkout page to view the order.

See Also

Chapter 10, "Creat," page 231

Page Used to Order Items from Express Forms

Page Name	*Definition Name*	*Navigation*	*Usage*
Business Cards	PV_EF_BUSCARD	eProcurement, Create Requisition Click the Add Items and Services link and select the Forms tab. Click the link for the express form that you want to use. The Business Cards page is an example page.	Enter data for express forms. When you enter the quantity of forms, the system updates the Amount field with the line total.

Using Express Requisitions

This section provides an overview of express requisitions and discusses how to:

*   Create form types for express requisitions.

*   Create express requisitions.

Understanding Express Requisitions

PeopleSoft eProcurement is delivered with an express form for use with express requisitions. This form enables users to complete fields with the details of the requisition, without having to browse through the provided catalogs. This is especially helpful for requesters who order multiple items, with or without an item id, on a regular basis. By specifying default data for use in place of blank field definitions, the requester can avoid duplicate entry. The requester can provide this default data at the beginning of the requisition creation process. When the basics of the requisition default date is defined, the requester moves to the item entry within the requisitions. The system populates the express requisition form with the default data that the requester supplied.

Express requisitions are controlled by either rule-based catalogs or by eProcurement role actions. If rule-based catalogs are enabled, the security hierarchy allows for either enabling or disabling the use of the express form entry. The system also looks to the express form type to determine which role actions control the security of the express form. The role action for the delivered express requisition form is EXPRESSREQ_ENTRY.

Pages Used for Express Requisition

Page Name	Definition Name	Navigation	Usage
Define Requisition	PV_REQ_HDR_DEFAULT	eProcurement, Create Requisition Click the 1. Define Requisition link and expand the Line Defaults section.	Use the Line Defaults section to establish values that the system will use when no predefined values are available. See Chapter 10, "Creat," Defining Requisitions, page 238.
Add Items and Services - Forms	PV_REQ_SR_WIZ_MAIN	eProcurement, Create Requisition Click the 2. Add Items and Services link and select the Forms tab.	Use the forms page to access the express form. See Chapter 10, "Creat," Selecting Forms to Include in Requisitions, page 252.

| Page Name	Definition Name	Navigation	Usage
Express Requisition	PV_EF_DATAENTRY	eProcurement, Create Requisition Click the 2. Add Items and Services link and select the Forms tab. Click the Express Requisition link.	Create express requisitions, which enable you to create multiple line requisitions without having to browse through catalogs. See Chapter 11, "Using Special Requests and Express Forms to Create Requisitions," Creating Express Requisitions, page 306.
Catalog Security Types	PV_CAT_SEC_TYPE	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types	Define catalog security types. These are levels at which you apply catalog security, for example, at the user role level or the individual requester level. See Chapter 5, "Importing and Searching Supplier Catalogs," Defining Catalog Security Types, page 114.
Catalog Security	PV_CAT_SECURITY	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types Click the Catalog Security link.	Assign authorized item catalogs to security types. See Chapter 5, "Importing and Searching Supplier Catalogs," Assigning Authorized Item Catalogs to Security Types, page 117.
Catalog Types	PV_CAT_SOURCE	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Types	Define catalog types. See Chapter 5, "Importing and Searching Supplier Catalogs," Defining Catalog Types, page 113.
eProcurement Catalog Security Option	PV_CAT_FACTORY	eProcurement, Administer Procurement, Maintain Catalogs, eProcurement Catalog Security Option	Define catalog security options. These are system-wide access policies and GUI (graphical user interface) formats for the rule-based item catalog method. See Chapter 5, "Importing and Searching Supplier Catalogs," Defining Catalog Security Options, page 112.

Page Name	*Definition Name*	*Navigation*	*Usage*
eProcurement Business Unit Actions	PV_ACTIONS_BU	eProcurement, Administer Procurement, Maintain Business Units, eProcurement Business Unit Actions, Assign Actions to Business Units	Define catalog security for business units. The applicable eProcurement actions enable security for items from the business template, express forms, and direct connect suppliers. See Chapter 5, "Importing and Searching Supplier Catalogs," Defining Catalog Security for Business Units, page 119.
Express Form Type	PV_EXP_APP_PROFILE	eProcurement, Administer Procurement, Maintain Supplier Integration, Maintain Express Form Profile	Create form types for express requisitions. Define the menu, component, page, and role action security for a specific express requisition form. See Chapter 11, "Using Special Requests and Express Forms to Create Requisitions," Create Form Types for Express Requisitions, page 305.
Security Type Attributes	PV_CAT_ST_ATTR	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types Select the Attributes tab.	Define security type attributes, which include query or prompt tables used. See Chapter 5, "Importing and Searching Supplier Catalogs," Defining Catalog Security Types, page 114.
Security Types Default	PV_CAT_ST_DFLT	eProcurement, Administer Procurement, Maintain Catalogs, Catalog Security Types Select the Security Types Default tab.	Review security type defaults. This display-only page identifies the system-defined security types and their implementation application classes. These values appear by default in the Catalog Security Types page, where you can use them for any setID. See Chapter 5, "Importing and Searching Supplier Catalogs," Defining Catalog Security Types, page 114.

See Also

Chapter 5, "Importing and Searching Supplier Catalogs," Understanding Catalog Security, page 109

Create Form Types for Express Requisitions

Access the Express Form Type page (eProcurement, Administer Procurement, Maintain Supplier Integration, Maintain Express Form Profile).

Express Form Type page

Description	The first description that you enter becomes the name of the link that the system uses on the Add Items and Services - Forms page.

Description	The second description forms the description details to the right of the express form link on the Add Items and Services - Forms page.
Role Action Security	If rule-based catalog security is not enabled, the system uses the eProcurement role action security based on the role action security type that is entered here.

See Also

Creating Express Requisitions

Access the Express Requisition page (eProcurement, Create Requisition. Click the 2. Add Items and Services link and select the Forms tab. Click the Express Requisition link).

Express Requisition page

Item	Select an item. If the requester uses assigned catalogs, then the items that are available are limited to those items from the catalogs that they are assigned. If the requester doesn't use assigned catalogs, then all items are available.
Description	This is an open format for requesters to enter data.
Quantity	The number of items.
UOM (unit of measure)	Requesters can select from appropriate values or this can be populated from the Define Requisitions page if defaults are available.
Category	If the item is not associated with a category, this information is supplied by default from the Define Requisitions page if defaults are available. This field is also based on requesters' assigned catalogs.
Price	User entered field.
Curr (currency)	This is supplied from the Define Requisitions page if defaults are available.

The system views items that are entered in express requisitions as if coming from an external source. The Quantity field is not an editable field after the requisition has been sent to review and submit. The details of these items are stored in an external source. So to edit the quantity, the user must click the item description to be taken to the external source, where the user can make the necessary changes.

You can use lines from express requisition as favorites, keeping in mind that:

- If you add an item from the express requisition that has an item ID, then the favorite will act as if the item were selected from the catalog.

- If no item ID exists, then the favorite will act as a special request item.

Chapter 12

Managing Requisitions in PeopleSoft eProcurement

This chapter provides an overview of requisition management and discusses how to:

* Maintain requisitions.

* Approve requisitions.

Understanding Requisition Management

The Manage Requisition feature provides you with the ability to review, edit, approve, or cancel requisitions. You can view requisitions in any status. You can only edit active requisitions that have not been sourced and do not have a status of *Complete,* or *Canceled.*

After you dispatch a requisition on a purchase order, the goods are received and the vendor is paid. The Requisition Reconciliation process (PO_REQRCON) then identifies the requisition status as *Complete.* .

Maintaining Requisitions

This section discusses how to:

* Manage requisitions.

* View requisition details.

* Edit requisitions.

* Maintain requisition distribution and accounting details.

* Change value added tax (VAT) details for distributions.

* Cancel or reopen requisitions.

See Also

Chapter 3, "Determining Technical Implementation Options," Setting Up Installation Options, page 22

Pages Used to Maintain Requisitions

Page Name	Definition Name	Navigation	Usage
Manage Requisitions	PV_REQ_STATUS	eProcurement, Manage Requisitions	View and manage requisitions.
Requisition Details	PV_REQ_PO_DTLS	Click the Req ID link on the Manage Requisitions page.	View requisition details.
Header Attachments	PV_REQ_HD_DATTCH	Click the Goto Attachments icon (paperclip) on the Requisition Details page.	Displays the attachments added to this requisition at the header level.
Item Description	PV_NEW_ITM_DESCR	Click the description of an item on the Requisition Details page.	View line item descriptions.
Edit Requisition	PV_REQ_FORM	Select *Edit* in the Select Action field on the Manage Requisitions page. Click the Go button.	Edit requisition information. This page is accessible only for open requisitions.
Requisition Schedule and Distribution	PV_REQ_APP_DTL_GRD	Click the Requisition Schedule and Distribution link on the Requisition Details page.	Maintain requisition distribution and accounting details.
Req Schedule One Time Address	PV_REQ_INQ_ADDR	Click the One Time Address icon on the Requisition Schedule and Distribution page.	Displays the details for a one-time ship to address that was added during requisition creation or edit. This page can only be accessed if a one-time address has been entered for this line and the the user is not linked to the eProcurement role action of NO_ONETIME_SHIPTO.
ShipTo Attachments	PV_REQ_SHIP_ATTCH	Click the Goto Attachments icon (paperclip) on the Requisition Schedule and Distribution page.	Displays the attachments added to this requisition at the ship to level.

Page Name	Definition Name	Navigation	Usage
VAT Information for Schedule	REQ_INQ_SCHED_VAT	Click the Schedule VAT icon on the Requisition Schedule and Distribution page.	Review value added tax (VAT) information for the schedule line. The page does not display when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants. See *PeopleSoft Enterprise Global Options and Reports 9.1 PeopleBook*, "Working with VAT."
VAT Details for Distribution	REQ_INQ_DIST_VAT	Click the Distribution VAT icon on the Requisition Schedule and Distribution page.	Review value added tax (VAT) information for the distribution line. The page does not display when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants. See *PeopleSoft Enterprise Global Options and Reports 9.1 PeopleBook*, "Working with VAT."
Requisition Details for <Requester>	PV_REQ_CANCEL	On the Manage Requisitions page, select Cancel or Undo-Cancel in the Select Action field. Click the Go button.	Cancel or reopen a requisition.

Page Name	Definition Name	Navigation	Usage
Approval Status	PV_REQ_APPROVAL	For a requisition with the *Approved* status, select Approvals, and click the Go button on the Manage Requisitions page.	View summary information for the requisition including the number of items and the total price. This page is similar in appearance to the Requisition Approval page.
Requisition Cycle for: <requester>	PV_REQ_CYCLE_PAGE	On the Manage Requisitions page, select View Cycle in the Select Action field. Click the Go button	Displays the business process flow for a requisition with links to various documents. The business process flow, or lifecycle, includes icons for requisition creation, requisition approval, sourcing to inventory stock, sourcing to a purchase order, purchase order acknowledgments (POA), advanced shipping notices (ASN), change requests, receiving, returns, invoices, and payment. The icons are highlighted when the requisition has completed the step. Some of the icons link you to additional information on a separate page. In order to access this page the user must be linked to the eProcurement role action of VIEW_REQ_CYCLE. In order to view the POA and ASN icons you must select the Requisition Cycle Options on the eProcurement Business Unit Options page.

Managing Requisitions

Access the Manage Requisitions page (eProcurement, Manage Requisitions).

Manage Requisitions page

Use this page to review requisitions. From this page, you can access other pages to perform tasks, such as review requisition details, edit or cancel requisitions, create change requests, receive stock, copy requisition, view approvals, or return stock to the vendor.

Before using this page, determine your display options:

• Use the eProcurement Installation Options page to define the maximum number of rows that are retrieved and appear on the Manage Requisitions page.

• If the eProcurement role action *NO_DEFAULT_RESULT* is assigned to a user, requisitions do not appear in the scroll area until the user clicks Search.

Search Requisitions

Enter search criteria in this group box and click the Search button to display requisitions below in the Requisitions group box. Search criteria include:

BU	Select the PeopleSoft Purchasing business unit.
Requisition Name	To find a specific requisition, enter the description of the request entered by the requester when the requisition was added.
Requisition ID	Enter a specific requisition ID to display.

Request Status   Select the status for the overall requisition (header-level) to limit the requisitions displayed to this status. Leave this field blank to display search results without using status as a search criteria. The following search criteria are included:

- *All but Complete:* Displays all requisitions except those with the status *Complete.*

- *Approved*

- *Cancelled*

- *Complete*

- *Denied*

- *Open*

- *PO Partially Canceled*

- *PO Partially Created*

- *PO(s) Created*

- *PO(s) Dispatched*

- *Partially Dispatched*

- *Partially Received*

- *Pending*

- *Received*

- *See Lines*

- *Service Complete*

- *Service Filled*

- *Service Sourced*

Note. Statuses are defined below for the Status field (at the requisition header level) in the Requisitions group box.

Budget Status	If you are using PeopleSoft Committement Control, select the budget status. The options are:

- *Open:* The budget can accept transactions.

- *Closed:* The budget is closed to transactions. You cannot enter budget journals, and the Budget Processor fails all transactions that might impact the budget.

- *Default:* The budget status is set to default from the control budget definition level. Default is to the next higher level in the hierarchy of control.

- *Hold:* Use to place the budget on hold. The Budget Processor fails transactions that would reduce the available balance, but you can enter and post budget journals.

Date From and **Date To**	Enter the creation date or range of dates for the requisitions.
Requester	Enter the requester of the requisition.
Entered By	Enter the user ID of the individual who entered in the requistion. This is usually the requester but can be another individual.
PO ID	Enter the purchase order ID where the requisition was sourced.

Requisitions

This group box displays requisitions based on the search criteria in the Search Requisitions group box. Basic information about the entire requisition (requisition header-level) is displayed for each requisition. You can view additional information, including line details by using the Expand Section icon.

Req ID (requisition id)	Click a requisition ID to access the Requisition Details page where you can view additional details of the requisition.
Requisition Name	Displays the description of the request entered by the requester when the requisition was added. The requisition name helps to identify this requisition as it flows through the system. If no requisition name was entered, then the requisition ID is displayed.
BU	Displays the PeopleSoft Purchasing business unit for this requisition.
Date	Displays the date the requisition was created.

Status(at the requisition header level)

This status field displays the status across the entire procurement cycle, not just the requisition header status. The following statuses are included:

- *Approved:* The requisition have been approved and is ready for sourcing. For this status to display at the header level, all lines of this requisition must be in the Approved status.

- *Cancelled:* The requisition was entered and saved but then the entire requisition or each requisition line was canceled. For this status to display at the header level, all lines of this requisition must be in the Canceled status. A canceled requisition can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently.

- *Complete:* The requisition is marked complete after the requisition is dispatched on a PO, the goods are received and the vendor is paid. A background process identifies the requisitions and moves them to the complete status. Canceled requisitions and those that are fulfilled by inventory stock are also identified as complete.

- *Denied:* The entire requisition or each requisition line has been denied in the approval process. For this status to display at the header level, all lines of this requisition must be in the Denied status.

- *Open:* The requisition has been entered and saved but not yet submitted. For this status to display at the header level, all lines of this requisition must be in the Open status.

- *PO Partially Canceled:* The requisition contains some lines that have been placed on purchase orders and these purchase orders have been subsequently been canceled. For this status to display, the purchase orders must all have the same status, Canceled. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to vendor.

- *PO Partially Completed:* The purchase order has been closed for some of the requisition lines , however the requisitions are not yet closed.

- *PO Partially Created:* The requisition contains some lines that have been sourced to an approved purchase order. For this status to display, the purchase orders must all have the same status, Approved. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to vendor.

- *PO(s) Created:* The requisition has been placed on a PO that has been approved. This header status indicates that all lines of this requisition have been sourced to approved purchase orders and the requisition line status is PO(s) Created. For this status to display, the purchase orders must all have the same status, Approved.

- *PO(s) Cancelled:* The requisition has been placed on a PO that has been subsequently been canceled. This header status indicates that all lines of this requisition have been sourced to canceled purchase orders and the requisition line status is PO(s) Canceled. For this status to display, the purchase orders must all have the same status, Canceled.

- *PO(s) Completed:* The purchase order has been closed for all of the requisition lines , however the requisitions are not yet closed.

- *PO(s) Dispatched:* The requisition has been placed on a purchase order and the purchase order has been dispatched to the vendor. This header status indicates that all lines of this requisition have been sourced to dispatched purchase orders and the requisition line status is PO(s) Dispatched. For this status to display, the purchase orders must all have the same status, Dispatched.

- *Partially Dispatched:* The requisition contains some lines that have been placed on purchase orders and these purchase orders have been dispatched to the vendor. For this status to display, the purchase orders must all have the same status, Dispatched. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to vendor.

- *Partially Received:* The requisition contains some lines that have been placed on a purchase order, the purchase order has been dispatched to the vendor, and the goods have been fully or partially received. This status indicates that some of the requisition lines have not been received.

- *Pending:* The requisition has been submitted and is awaiting approval. This header status indicates that all lines of this requisition have the line status of Pending.

- *Received:* The requisition has been placed on a purchase order, the purchase order has been dispatched to the vendor, and the goods have been fully received. For this status to display at the header level, all lines of this requisition must be in the Received status.

- *See Lines:* The lines of this requisition are in various stages of the approval process and the lines have different statuses (i.e. pending, approved, denied, and so on); however, none of the lines have been sourced to a purchase order.

Budget   View the budget status for the requisition. This column appears when Commitment Control is enabled.

<Select Action>   Select an option and click the Go button to perform the action. The available
                               actions vary depending on the status of the requisition. Actions include:

- *Approvals* displays the Approval Status page.

- *Cancel* displays the Requisition Details for: <name> page
  (PV_REQ_CANCEL), which has a Cancel Requisition button.

  When the Cancel Requisition button is clicked, a confirmation page is
  displayed, where the user can enter a reason code and a comment.

- *Check Budget* launches the Budget Processor from PeopleSoft Commitment
  Control.

- *Copy* displays the Create Requisition - Review and Submit page.

  All items are copied to the new requisition. However, if one item was created
  from a special request, a message appears.

- *Edit* displays a warning message indicating that editing the requisition will
  restart the approval process.

  Click OK to continue or click Cancel to go back. If you click OK, the Edit
  Requisition - Review and Submit page appears for the requisition. Changing
  a requisition can create a change request.

- *Pre-Check Budget* launches the Budget Processor from PeopleSoft
  Commitment Control and checks the budget without reserving funds for this
  requisition. This option enables you to check whether a budget exists for this
  requisition before committing amounts to a pre-encumbrance or
  encumbrance.

- *Process Return* displays the Return to Vendor (PV_RTV) page.

- *Receive* displays the Receive Items page.

- *Undo Cancel* displays the Requisition Details for: <name> page.

  This option is only available when a requisition is in a Canceled status.

- *View Print* displays the print version of the requisition.

- *View Cycle* displays the Requisition Cycle page (PV_REQ_CYCLE_PAGE).
  The user must be linked to the eProcurement role action of
  VIEW_REQ_CYCLE to see this page. Without this eProcurement role
  action, a requester views this information by clicking the Expand Section
  icon next to a requisition in the Requisition group box of this page.

Note. The options that appear for a requisition differ depending on the status of
the requisition. For example, you cannot cancel a requisition for which a PO is
created.

Go   Click to perform the selected action.

|	
Create New Requisition	Click to access the Create Requisition page, where you can add another requisition.
Review Change Request	Click to access the Change Request List for page, where you can view and process change requests.
Review Change Tracking	Click to display the View Requisition Change Tracking History page where you can view changes to requisitions if you are using the change tracking feature. This page provides an audit trail of key transactional information including, changes to any fields marked for track changes on the change template, the user who modified the requisition, and the date and time of each requisition change request.
Manage Receipts	Click to access the Receipts For page, where you can view and maintain receipts.
Requisition Report	Click to access the Print Requisition process page, where you can define parameters for creating the printed requisition report (POY1100).

Requisition Cycle

Access the Requisition Cycle section of the Manage Requisitions page (Click the Expand Section icon next to a listed requisition).
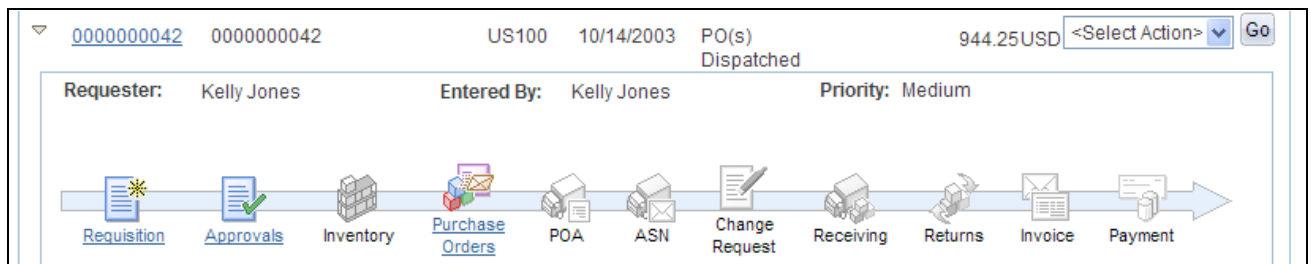
Requisition Cycle section of the Manage Requisitions page (partial)

The Requisition Cycle section displays the business process flow for a requisition with links to various documents. The business process flow or lifecycle, includes icons for requisition creation, requisition approval, sourcing to inventory stock, sourcing to a purchase order, purchase order acknowledgments (POA), advanced shipping notices (ASN), change requests, receiving, returns, invoices, and payment.

Stages in the requisition cycle that are complete or in progress are highlighted with active links.

This same information can be viewed on a separate page, the Requisition Cycle for: <requester> page (PV_REQ_CYCLE_PAGE), if the user is linked to the eProcurement role action of VIEW_REQ_CYCLE. To access this page select View Cycle in the Select Action field and click the Go button.

Requisition	Click the Requisition icon to access the Requisition Details page where you can view detailed information about this requisition.
Approvals	Click the Approvals icon to access the Approval Status page (PV_REQ_APPROVAL) where you can view the current approval status of the requisition and view line approval details.

Inventory   Click the Inventory icon to access the Stock Requests page (ORDER_INQ_INV)
                         where you can view the material stock request created from this requisition to
                         fulfill the demand using inventory stock.

Purchase Orders   Click the Purchase Orders icon to access the Purchase Order Inquiry page
                         (PV_PO_LINE_INQ_2) where you can view information about the purchase
                         order that this requisition was sourced to; including, the purchase order number,
                         buyer, and vendor.

POA   Click the POA icon to access the POA Summary page
                         (PO_SS_POA_SUMMARY) where you can view the purchase order
                         acknowledgement tied to this requisition. You can review any comments or
                         changes from the vendor.

ASN   Click the ASN icon to access the ASN History Summary page
                         (PV_ASN_INQUIRY) where you can view the advanced shipping notice tied to
                         this requisition. You can review the arrival date, bill of lading number, carrier,
                         and other information about the incoming shipment.

Receiving   Click the Receiving icon to access the Manage Receipts page
                         (PV_RECV_UPDATE) where you can view the purchase order receipt linked to
                         your requisition.

Returns   Click the Returns icon to access the Manage Return to Vendors page
                         (PV_RTV_UPDATE) where you can view the RTV linked to your requisition.

**Invoice**   Click the Invoice icon to access the Purchase Order Inquiry page
                         (PV_PO_INQUIRY) where you can view the requisition, purchase order,
                         receipts, and vouchers.

Line Information

Access the Line Information group box (On the Manage Requisitions page, click the Expand Section icon
next to a listed requisition).

Line Information group box (partial)

The Line Information group box displays information about each line within the requisition.

Description   Click the link to access the Item Description page where you can view
                                   information about the item.

| **Status**(at the requisition line level) | This status field displays the status of the requisition line. The statuses include: |

- *Approved:* The requisition line has completed workflow approval and is approved. The line is ready for sourcing.

- *Cancelled:* The requisition line was entered and saved but then canceled. A canceled requisition line can be reopened within a certain number of days as specified for the Purchasing business unit; otherwise, it is closed permanently.

- *Complete:* The requisition line is marked complete after the line is dispatched on a PO, the goods are received and the vendor is paid. A background process identifies the requisition lines and moves them to the complete status. Canceled requisition lines and those that are fulfilled by inventory stock are also identified as complete.

- *Denied:* The requisition line has been denied in the approval process.

- *Open:* The requisition line has been entered and saved but not yet submitted.

- *PO(s) Created:* The requisition line has been placed on a PO that has been approved.

- *PO(s) Canceled:* The requisition line has been placed on a PO that has been subsequently been canceled.

- *PO(s) Dispatched:* The requisition line has been placed on a purchase order and the purchase order has been dispatched to the vendor.

- *Pending:* The requisition line has been submitted and is awaiting approval.

- *Received:* The requisition line has been placed on a purchase order, the purchase order has been dispatched to the vendor, and the goods have been fully received.

✖ (Cancel Requisition icon)	Click this icon to cancel a line on the requisition. You can cancel a requisition that has been sourced to a purchase order. If the cancellation completes budget checking and workflow approval, then the system creates a change request for cancelling the corresponding purchase order lines. However, a requisition line cannot be cancelled if it is associated to the only active schedule line on a purchase order. In addition, a requisition line cannot be cancelled if you are using Commitment Control and the line has not yet pass budget checking.
	If the approval process includes one or more stages that have only header level approval and a requisition line is cancelled, the entire requisition is resubmitted for approval for the entire approval process. For example, all stages are resubmitted.
	If the approval process includes one or more stages that have only line-level approval and a requisition line is cancelled, the line approval thread is terminated.
	If the approval process includes two or more stages that have a combination of line-level and header-level approval and a requisition line is cancelled, the line-level approval thread is terminated if the current stage that the approval is on is a line-level approval. If the current stage is a header-level , then the requisition is resubmitted for the entire process.

See Also

PeopleSoft Enterprise Approval Framework 9.1 PeopleBook

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Understanding Requisitions," Canceling Requisitions and Requisition Lines

Viewing Requisition Details

Access the Requisitions Details page (Click the Req ID link on the Manage Requisitions page).

Requisition Details page

Use this page to view details about individual requisitions. The PO Information header appears only if a PO was created for the requisition.

✎ (Go To Attachments)	Select this icon to access the Header Attachments page where you can view the attachments to this requisition header.
Header Comments	Displays any comments added at the requisition header-level. See Chapter 10, "Creat," Adding Comments at the Requisition Header Level or Ship To Level, page 277.
Item Description	Click to view an item's description. You can also access the item's detail document.

Source Status	View the stage of the requisition line in the sourcing process. Values include:

- *Not Sourced*

- *Available:* The requisition line has not yet been placed on a PO or inventory stock request.

- *In Process:* A sourcing process is running on this requisition line or an error occurred in creating a PO.

- *Staged:* The requisition has been staged to the sourcing tables. This status is a link to the Sourcing Workbench in PeopleSoft Purchasing where you can view the details of the sourcing status.

- *Complete:* The requisition line has been sourced to an inventory stock request or a PO. This status is a link to the Sourcing Workbench in PeopleSoft Purchasing where you can view the details of the sourcing status.

- *Error:* The requisition line is in error on the Sourcing Workbench. This status is a link to the Sourcing Workbench in PeopleSoft Purchasing where you can view the details of the sourcing status.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Using Purchase Order Sourcing," Using the Sourcing Workbench.

Amount Only	A *Y* indicates that this line is for an amount value only. The quantity will be 1, and only one schedule line will be available.
Sourced from Inventory	Click the Sourced from Inventory button to access the Requisition to MSR List page, where you can view stock request information.
	This button only appears if the requisition line item is defined as an inventory item in PeopleSoft Inventory on the Item Definition - General : Common page.
Line Comments	Displays any comments added at the requisition line-level.
	See <u>Chapter 10, "Creat," Adding Comments to the Requisition Lines, page 267.</u>
Requisition Schedule and Distribution	Click this link to access the Requisition Detailed Summary page, where you can view line details, schedules, and distribution information.

Contract Information

This group box appears if a contract ID has been assigned to the requisition line. Expand this section to see contract details.

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contacts with requisitions, purchase orders, and vouchers. As part of the contract functionality, you can set up requisitions to automatically search for a contract to use for requisitions. Applying default contract prices to requisitions enables you to receive contract prices for requisition items and to more accurately track budgets and pre-encumberance balances.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Requisitions Online," Applying Contracts to Requisitions.

Contract ID	Displays the purchasing contract used to price this requisition line. The contract ID can be entered manually on the Review and Submit-Line Details page when creating and editing a requisition. A contract ID can also be added automatically by the system when you have selected the Default Contract On Req check box on the Purchasing Definition - Business Unit Options page.
Version	Displays the contract version applied to this requisition line. Multiple versions are available when you are using version control. Contract versions enable contract administrators to create and maintain multiple versions of a contract in the procurement system.
Contract Line	Displays the contract line applied to this requisition line.
Category Line	Displays the contract category line number. Categories enable you to specify groups of items on a contract, rather than having to enter the items one at a time.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts."

PO Information

This group box appears if the requisition line.Expand this section to view the PO line that was created for the requisition line.

Receipt Status	Displays the receipt status for this PO. Values include:
	PO Not Received: No quantities for this PO line have been received.
	PO Partially Received: Part or all quantities for this PO line have been received. Even if the quantity is fully received, the status does not change until you run the Match Request process in PeopleSoft Payables.
	PO Received: All quantities for this PO line have been received. Run the Matching process (AP MATCHING) in PeopleSoft Payables.
View Receipt	Click the View Receipt button to access the Receipt For a Casual User page. This button appears if a receipt was recorded for this line.

Editing Requisitions

Access the Edit Requisitions page (Select *Edit* in the Select Action field on the Manage Requisitions page. Click the Go button).

Edit Requisition page

This page is similar in appearance and usage to the Create Requisitions page. Most field descriptions are located on the Create Requisition page, the remaining fields are discussed below.

Track Batch

Displays the track batch (change batch) sequence number. This field only displays if you have changed a field marked for track change on the requisition change template. The first time that you save a changed requisition, the system displays Track Batch 1 in the requisition header. Each time that you make a change to the requisition, the system increases the track batch number by one. The track batch sequence number is displayed on the View Requisition Change Tracking History page to distinguish one change from another change and from the original field value.

If your user ID is linked to the eProcurement role action of NOVICEREQSTR, then the track batch sequence number does not display.

The Sourced to Purchase Order icon displays to the right of the Line number and indicates that the requisition line has been sourced to a purchase order line. If the line has not yet been sourced to a purchase order, no icon is displayed.

The Unavailable for Edit icon displays to the right of the Line number and indicates that the requisition line cannot be changed. Users cannot edit requisition lines when:

- The line have been submitted for an RFQ (request for quote).

- Sourcing is in process for the requisition line.

- A sourcing event is in process for the line item.

- The line is sourced to PeopleSoft Inventory

- The line is a Services Procurement requisition line that has been sourced.

Current Change Reason Click this link to access the Change Reason page where you can view the reason code and comments attached to a change request.

See Chapter 16, "Changing Requisitions and Using Change Requests," Entering Reason Codes and Comments, page 449.

Maintaining Requisition Distribution and Accounting Details

Access the Requisition Schedule and Distribution page (Click the Requisition Schedule and Distribution link on the Requisition Details page).

Requisition Schedule and Distribution page

This page has three sections: Line, Schedule, and Distribution.

Line

The Line section contains all of the line items on a requisition. To view the item's description, click the item name.

Schedule

The Schedule section displays shipping information for the item, such as where the item is being shipped, when it's due, the amount, and cost of the item.

Ship To	The location code that indicates the location where the vendor should deliver the items.
(One Time Address)	Select this icon to view the Req Schedule One Time Address page (PV_REQ_INQ_ADDR) where you can view a one-time ship to address added to this requisition line when it was added or edited. The One Time Address icon is not visible if the user is linked to the eProcurement role action of NO_ONETIME_SHIPTO.
Due	The date the items are scheduled to arrive at the Ship To location.
(Go To Attachments)	Select this icon to access the ShipTo Attachments page where you can view the attachments to this requisition at the Ship To level.
	See Chapter 10, "Creat," Adding Comments at the Requisition Header Level or Ship To Level, page 277.
(Schedule VAT icon)	Click the Schedule VAT icon to access the VAT Information for Schedule page, where you can review value added tax (VAT) information for the schedule line. The icon does not appear when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants.
	See *PeopleSoft Enterprise Global Options and Reports 9.1 PeopleBook*, "Working with VAT."
Ship To Comments	Displays comments added to this requisition at the ship to level.
	See Chapter 10, "Creat," Adding Comments at the Requisition Header Level or Ship To Level, page 277.

Distribution - Details

Access the Requisition Schedule and Distribution: Details tab.

Dist # (distribution number) — Displays the number the system assigns to this distribution. The system uses this numbering to distinguish between multiple distributions for a single requisition line.

Status — Distribution statuses include:

Open: The distribution line is open.

Complete: The distribution line is closed.

Processed: The distribution line has been processed and is unavailable for sourcing.

Canceled: The distribution has been canceled.

Dist Type (distribution type) — Displays the method by which the system allocates or charges an expense account distribution. Values include:

Amt (amount): The sum of all distribution amounts must equal the schedule amount (merchandise amount). Inventory items cannot be distributed by amount.

Qty (quantity): The sum of all distribution quantities must equal the schedule quantity.

(Distribution VAT icon) — Click the Distribution VAT icon to access the VAT Information for Distribution page, where you can review value added tax (VAT) information for the distribution line. The icon does not appear when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants.

See *PeopleSoft Enterprise Global Options and Reports 9.1 PeopleBook*, "Working with VAT."

Distribution: More Details

Access the Requisition Schedule and Distribution: More Details tab.

Select the More Details tab.

Along with viewing accounting information, you can access projects. Click the Projects link to view and update projects and activities.

Distribution: More Details 2

Access the Requisition Schedule and Distribution: More Details 2 tab.

Stat Code (statistics code) — Displays the code used to maintain statistical amounts to facilitate financial analysis and reporting. You can track a variety of nonmonetary amounts with statistics.

Open Amt (open amount)   Displays the amount that is still open on the PO. Values appear in this field when the distribution type is *Amt.*

Open Quantity   Displays the quantity that has not been received and is still open on the PO. Values appear in this field when the distribution type is *Qty.*

Base Amt (base amount) Displays the monetary value for this distribution line. The value appears in the base currency for the business unit. The currency type also appears with the value.

                            If the currency is different than the base currency, an exchange rate also appears.

Exch Rt (exchange rate) Displays the ratio between the base currency and the alternate currency.

Distribution: Asset Information

Access the Requisition Schedule and Distribution: Asset Information tab.

Profile ID   Displays the default asset profile ID associated with distribution items.

CAP ID (capital   The CAP identification ties the asset to a capital acquisition plan.
acquisition plan ID)

Sequence   Displays the sequence number for the capital acquisition plan.

Tag Number   If you use tags to track assets, enter the tag number assigned to the asset.

EmplID (employee ID)   Employee ID of the custodian for this distribution item.

Capitalize   Select to designate this item as a capitalized item. If the item is capitalized, it can be depreciated before the order is paid.

Cost Type   Displays the default cost type associated with the item purchase, if applicable. Cost types represent components of the cost of an asset, such as materials, labor, and overhead.

Activity   Displays the activity associated with this distribution item.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Item Attributes

Changing VAT Details for Distributions

Access the VAT Details for Distribution page (Click the Distribution VAT icon on the Requisition Schedule and Distribution page).

Use this page to view VAT details at the distribution line level. Information that appears on the page relates to the requisition line number item and the schedule that you selected on the Manage Requisitions page. The page does not display when the Calculate VAT on Req check box at Purchasing business unit level is not selected, the purchasing business unit is not in a VAT environment, or the VAT_DETAILS eProcurement role action is not used. Using this page, you can override the recovery percentage and rebate percentage, and recalculate or reset VAT defaults changes that are made to VAT determinants.

VAT Details for Distribution page

VAT Defaults

Use Type

Determines VAT recoverability. The field value is retrieved from the VAT default hierarchy, but you can override this value.

Use type is a type of activity in which a purchased good or service will be used and, therefore, to determine a recoverability percent and a rebate percent (when applicable) that is applied to a transaction line. Activities are categorized as taxable, exempt, or mixed. Where activity is mixed, you can associate either the ratio of taxable activity to exempt activity directly with the use type, or you can indicate that this ratio is determined at the ChartField level.

Apportionment Control

Displays the business unit that you want to control the VAT apportionment. This value appears by default from the Purchasing business unit. VAT apportionment is the mechanism that enables you to specify the ratio of taxable activity to exempt activity for individual ChartFields.

Recovery Source

Select whether the VAT recovery is *Automatic* or *Manual.* This value appears by default from the Purchasing business unit. If you select *Manual,* enter a value in the Recovery Percent field.

Rebate Source

Select whether the VAT rebate is *Automatic* or *Manual.* This value appears by default from the Purchasing business unit. If you select *Manual,* enter a value in the Rebate Percent field.

Treatment

Controls default and transaction behavior. A description of how the transaction must be treated for VAT purposes. This value is used to determine how VAT defaults are applied, what accounting entries are required, and how and if the transaction is reported on the VAT return. You can override the values in this field.

The VAT defaulting hierarchy determines the value of this field based on the country in which the service is deemed to have been performed, and the countries in which the bank and beneficiary are located and registered.

VAT Code

Select a value to specify the rate at which VAT is calculated. The VAT code used to define a percentage the system uses to determine the VAT amount. The VAT code is similar to the sales and use tax code, with a few exceptions.

The tax authority tied to the VAT code generally consists of a single authority, and the ChartFields for a VAT code don't reside with the tax authority but are determined by the combination of the VAT code, VAT account type, and VAT transaction type.

Transaction Type

Select a value to categorize VAT transactions according to particular VAT accounting and reporting requirements. The VAT code and the VAT transaction type are used in conjunction with the VAT account type to obtain the ChartFields for accounting entries.

VAT Calculations

Transaction Amount	VAT amount in the transaction currency.
Transaction Amount Base	VAT amount in the base currency.
Basis Amount	VAT basis amount in transaction currency.
Basis Amount Base	VAT basis amount in the base currency.
Tax Rate	Displays the rate at which this item is taxed.
Recorded Amount	Displays the amount of VAT calculated for the schedule in the transaction currency.
Recorded Amount Base	Displays the amount of VAT calculated for the schedule in the base currency.
Recovery Percent	Displays a system-calculated value based on the selected VAT use type. You can override the automatic value if the VAT Allow Override Recovery/Rebate field on the business unit indicates that manual override is allowed. This value must be smaller than or equal to 100 and a positive number.
	To access the field, select eProcurement, Procurement Application Admin, Maintain Business Units, Processing Options, and click the Set VAT Default link.
Rebate Percent	Displays a system-calculated value based on the selected VAT use type. You can override the automatic value if the VAT Allow Override Recovery/Rebate field on the business unit indicates that manual override is allowed. This value must be smaller than or equal to 100 and a positive number.
	To access the field, select eProcurement, Procurement Application Admin, Maintain Business Units, Processing Options, and click the Set VAT Default link.
Recovery Amount	VAT recovery amount in the transaction currency.
Recovery Amount Base	VAT recovery amount in the base currency.
Rebate Amount	Calculated VAT rebate amount in the transaction currency.
Rebate Amount Base	Calculated VAT rebate amount in the base currency.

See Also

PeopleSoft Enterprise Global Options and Reports 9.1 PeopleBook, "Working with VAT"

Canceling or Reopening Requisitions

Access the Requisition Details for: <name> page (On the Manage Requisitions page, select Cancel or Undo-Cancel in the Select Action field. Click the Go button).

Requisition Details for: <name> page for the action of Cancel

Requisition Details for: <name> page for the action of Undo-Cancel

Click a line item link to review the details of that line item.

Cancel Requisition   Click to cancel a requisition. You can cancel any requisition for which a purchase order is not already submitted.

Reopen Requisition   Click to reopen a canceled requisition.

Approving Requisitions

Within PeopleSoft eProcurement, the approval of a requisition is handled by the approval workflow framework. After a requisition is created, the system routes the transaction to an approver. The approver can view and take action in two ways: using their worklist or navigating directly to the Manage Requisition Approvals page. The approver can preview, in a graphical format, the path that the requisition approval will take, view who has already approved the requisition, and see any comments that previous approvers have entered. Once a requisition has completed the approval process, the requisition can be sourced to a material stock request or purchase order.

Chapter 13

Using the Buyer Center

This chapter provides an overview of the Buyer Center, lists common elements, and discusses how to:

* Use the Supplier Relationship Management (SRM) Dashboard.

* Manage purchase orders (POs).

* Expedite requisitions.

* Use the Quick Sourcer.

* Dispatch POs.

* Approve change requests.

* Run procurement processes.

* Access vendor tables, item tables, and return to vendor.

* Access inquiries and reports.

* Generate and view PeopleSoft eProcurement information.

Understanding the Buyer Center

The Buyer Center is a PeopleSoft eProcurement page that is designed for organization buyers. The Buyer Center page provides numerous links to PeopleSoft Purchasing and enables you to:

* Process requisitions and change requests from requesters.

* Add purchase orders and change orders.

* Perform tasks that are related to a purchasing position.

The Buyer Center enables buyers to turn requisitions into purchase orders and dispatch them. This diagram illustrates the process flow from a requisition, through sourcing, to a dispatched purchase order:
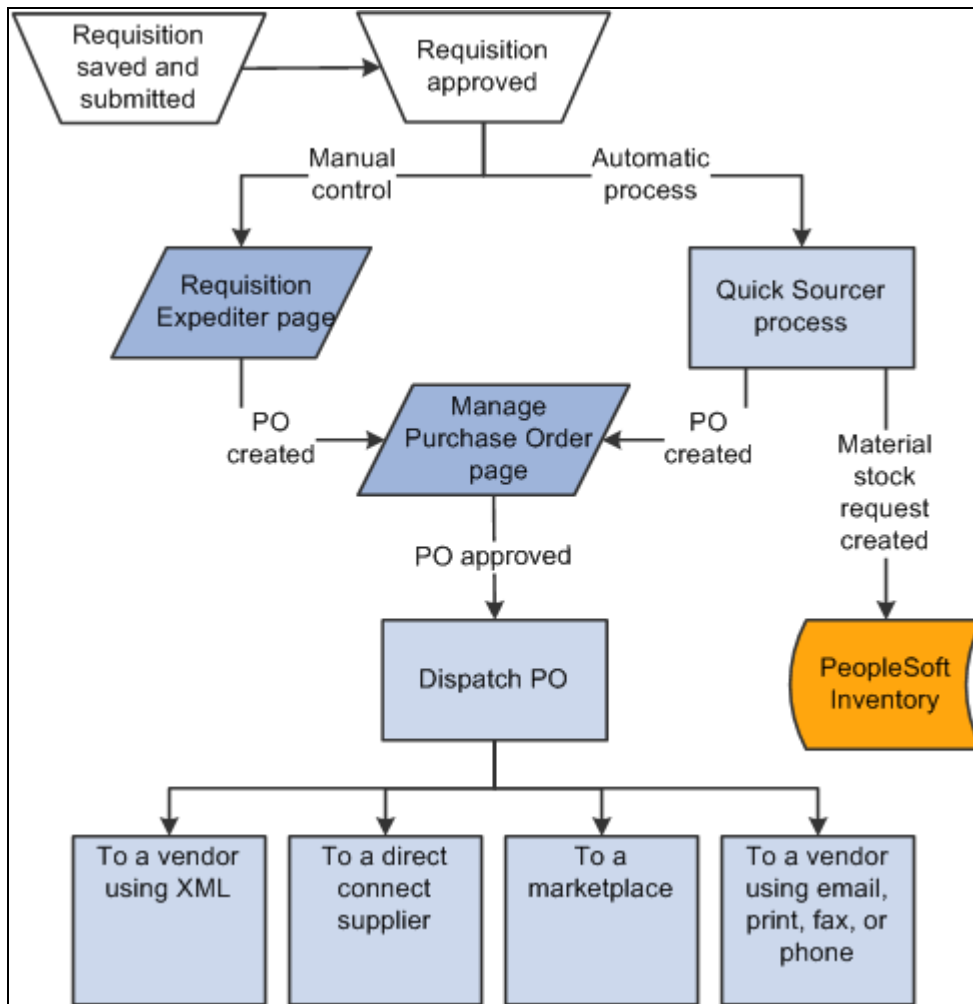
Requisition to PO process flow within PeopleSoft eProcurement.

See Also

Chapter 10, "Creat," Creating Requisitions, page 236

Chapter 12, "Managing Requisitions in PeopleSoft eProcurement," Approving Requisitions, page 336

Chapter 14, "Dispatching Purchase Orders in PeopleSoft eProcurement," page 367

Chapter 13, "Using the Buyer Center," page 337

Common Elements Used in This Chapter

Search   Click to initiate a search for the purchase orders or requisitions that meet the
                                    criteria. A purchase order must match all of the search criteria that you enter. If
                                    you cannot find the purchase order that you want, remove some of the search
                                    criteria to broaden the search, and try again.

Business Unit	Displays the purchasing business unit.
Attachments	Click to display any files that are attached to this transaction.
P-card (procurement card)	Displays if a purchase order uses a procurement card to purchase items from the vendor.

Using the SRM Dashboard

The SRM Dashboard is a centralized portal page with multiple pagelets that provide buyers with essential information to assist them with their daily jobs in one location. These buyer-facing pagelets are delivered with the SRM Dashboard and can be accessed if PeopleSoft Purchasing or PeopleSoft eProcurement are installed.

You may add any the delivered pagelets to the SRM Dashboard page.

The information that appears on each pagelet is by *buyer* or *buyer manager.* When a buyer logs into the system, the first page that appears is their home page with their selected pagelets. The information that appears on each pagelet is only those POs or requisitions on which they are specified as the buyer. If a buyer is responsible for multiple purchasing business units, the POs and requisitions for all purchasing business units will appear.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Using the Supplier Relationship Management (SRM) Dashboard"

Chapter 4, "Determining Functional Implementation Options," Setting Up and Maintaining Users, page 96

PeopleSoft Enterprise eSupplier Connection 9.1 PeopleBook, "Using PeopleSoft eSupplier Connection Pagelets"

Managing Purchase Orders

This section discusses how to manage purchase orders.

Page Used to Manage Purchase Orders

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Purchase Orders	PV_PO_LIST	eProcurement, Buyer Center, Manage Purchase Orders	Manage POs by adding a new PO, changing an existing PO, or creating a change order.

Managing Purchase Orders

Access the Manage Purchase Orders page (eProcurement, Buyer Center, Manage Purchase Orders).

Manage Purchase Orders page

Use the top section of this page to search for existing POs.

Vendor ID	Enter a Vendor ID to limit the list of purchase orders to a specific vendor.
PO ID(purchase order ID)	To further narrow the list of POs, enter the ID to display a specific PO.
Buyer	Enter the name of the buyer on the PO. You can select only buyers that are authorized for the user ID on the User Preferences page.
Date From and Date To	This is a range of dates from which the system will limit the view of POs within the list of POs.
Filter By	Select the method by which you want to filter POs that appear in the list. You can filter by: *All, Approved, Dispatched, Open,* or *Pending.*
Add New PO (add new purchase order)	Click to access the Maintain Purchase Order page, where you can create a new PO.

List of Purchase Orders

PO ID(purchase order ID) Click to access the Maintain Purchase Order page, where you can review and maintain header and line-level details for a PO.

Vendor Displays the Vendor ID used on this PO. This is the supplier to whom the PO is sent.

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Defining User Preferences"

Chapter 3, "Determining Technical Implementation Options," Setting Up Installation Options, page 22

Chapter 3, "Determining Technical Implementation Options," Setting Up Attachments for Transactions, page 26

Expediting Requisitions

This section discusses how to:

• Review requisitions created by employees.

• Review and change staged purchase order details.

Pages Used to Expedite Requisitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Expedite Requisitions	PV_PO_REQ_SOURCE	eProcurement, Buyer Center, Expedite Requisitions	Review requisitions created by employees.
Attachments	PV_REQ_PO_ATTCH	Click the Go To Attachments icon (paper clip) on the Expedite Requisitions page.	View the attachments added to this requisition line.
Staged Purchase Order	PV_PO_REQ_CREATE	Click the Preview button on the Expedite Requisitions page.	Review and change the staged PO.

Reviewing Requisitions Created by Employees

Access the Expedite Requisitions page (eProcurement, Buyer Center, Expedite Requisitions).

Expedite Requisitions

Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

*Business Unit:	US100	Category:
Requisition ID:		Vendor Name:
Requisition Name:		☑ Include Lines With No Vendor
Requester:	KELLYJONES	Kelly Jones
Buyer:		

[Search] [Clear]

Requisition Schedule Lines   Customize | Find | View All | 🔲 | 🖩 | First ◄ 1-2 of 2 ► Last

Include	Requisition ID	Line	Sched	Item Description	Select	Vendor Name	Location	PO Qty	UOM	Price	Curr.	Amount Only
☐	0000000040	1	1	Whiteboard, 5 x	☐	EASTBAY-001	MAIN	75.000	EA	123.85	USD	N
☐	0000000038	1	1	White Board, 3	☐	EASTBAY-001	MAIN	5.0000	EA	65.00	USD	N

☐ Include All/Exclude All   ☐ Select All/Deselect All
          └ [   ] 🔍 [Apply Vendor to Selected Lines]

Build Purchase Order

To send all included requisition schedule lines to the staging tables where they will be converted into purchase orders, select a default buyer and click the Submit button. The default buyer is used on the purchase order only if another buyer is not found on the staging tables or default hierarchy, or if the transactions are consolidate by buyer.

*Default Buyer ID: CHRISBAKER   ☑ Build POs as Approved

[Submit]   [Preview]

Process Monitor

Expedite Requisitions page

Use this page to define requisition search criteria and to display requisitions. After completing the search criteria, click the Search button to display any requisitions that meet the criteria. Click the Clear button to clear the page of requisitions and enter new search criteria. The requisition must meet the following conditions before it can be selected:

- The requisition line status must be *Approved.*

- The inventory source flag on the requisition line must be *N (no).*

- The request for quote indicator on the requisition line must be *N (no).*

- The In Process flag on the requisition line must be *N.* When one line on a requisition is selected for sourcing, the In Process flag on the requisition line is set to *Y (yes),* indicating that the line can't be touched until sourcing is complete. Once sourcing is complete, the In Process flag is turned off and can be changed.

- The Hold Status on the requisition header must be *N.*

- The Budget Header Status on the requisition line must be *V (valid).*

- The Balance Status on the requisition schedule must be *I (in balance).*

- The Open Quantity or Open Amount on the requisition distribution must be greater than *zero.*

After requisitions appear, you can change or add a vendor or create a PO.

Search Requisition Schedule Lines

Use the Search Requisition Schedule Lines group box to define your search criteria for the requisition schedule lines displayed below.

Business Unit	Enter the purchasing business unit.
Category	Enter a single item category to search.
Requisition ID	Enter a requisition ID to limit your search to one requisition.
Requisition Name	Select the name of a specific requisition that you want to view or maintain. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.
Vendor Name	Select a vendor to limit your search to the requisitions with this vendor.
Requester	Select a requester ID to limit your selection to requisitions entered by this individual.
Buyer	Select a buyer ID to limit your selection to requisitions with this buyer.
Include Lines with No Vendor	Selecting this check box enables the system to display lines that do not have a vendor associated with them. These lines can then be manually updated to include a vendor for sourcing.

Requisition Schedule Lines

Include	Select to include an individual requisition in the planned purchase order. When you initially select a requisition for inclusion in the purchase order, the system activates the Submit and Preview buttons. Deselect the check box to remove the requisition from the planned purchase order later.
Include All/ Exclude All	Select the check box to include all requisitions in the planned purchase order. The requisitions must first have valid vendors assigned to them. Deselect the check box to remove all requisitions from the planned purchase order.
Vendor Name	Enter the vendor ID of the vendor that you want assigned to each requisition. You can assign vendors by either selecting a vendor in individual rows or click the Select All/Deselect All check box and the Apply Vendor to Selected Lines button to assign a single vendor to multiple lines.
Select All/Deselect All	Select this check box to select all lines and apply the vendor that appears in the field below when you click the Apply Vendor to Selected Lines button.
Apply Vendor to Selected Lines	Click to apply the vendor ID that appears in the Vendor field at the left of this button to the requisition lines that have been selected using the Select All/Deselect Allcheck box.

PO Qty (purchase order quantity)	The quantity that is ordered from the vendor. This value is from the Requisition Quantity field, but you can change the quantity before you create the purchase order.
Amount Only	Displays if the line is an amount-only line.
✎ (Go To Attachments)	Select this icon to access the Attachments page where you can view the attachments to this requisition at the line level.
	See Chapter 10, "Creat," Adding Comments at the Requisition Header Level or Ship To Level, page 277.

Build Purchase Order

Use the Build Purchase Order group box to send all included requisition schedule lines to the staging tables where they are converted into purchase orders.

Default Buyer ID	Select the name of the buyer to use on the PO. This value only applies if another buyer is not found on the staging table or default hierarchy, or if requisitions are consolidated by buyer. These buyers are listed on the User Preferences page.
Build POs as Approved (build purchase orders as approved)	Select to have purchase orders created with an *Approved* status when you run the Create Purchase Orders process. If selected, the process examines auto approval criteria set at the business unit level. If the auto approval criteria is met, the status is set to *Approved.* If the auto approval criteria is not met, the status is set to *Pending* approval, and the purchase order enters the approval process. If you do not select this check box, the purchase order is created with a status of *Open.*
Submit	Click to create the purchase order for the requisition lines that you have selected using the Include button, which is located at the bottom portion of this page. The Submit feature stages the items and launches the PO Calculations process (PO_POCALC) and Create Purchase Order process (PO_CREATE). You must assign a vendor to the requisition line before the system can create a purchase order.
	For requisitions containing a negative price item, the above processes do not reprice the requisition line, create partial sourcing, or consolidate with other requisitions onto one purchase order. For more information about negative price items, see the "Using a Negative Price on Special Request Pages" section of the "Using Special Requests and Express Forms to Create Requisitions" chapter.
	See Chapter 11, "Using Special Requests and Express Forms to Create Requisitions," Using a Negative Price on Special Request Pages, page 286.
Preview	Click to display a preview of the purchase order before it is actually staged. You must select the requisition, click the Includebutton in the lower portion of this page, before you can preview.

Reviewing and Changing Staged Purchase Order Details

Access the Staged Purchase Orders page (Click the Preview button on the Expedite Requisitions page).

Staged Purchase Orders page

Distribute by	To split this shipment schedule line into multiple distribution lines, select *Quantity* or *Amount* as the method of splitting.

Distribution Detail

PO Qty (purchase order quantity)   The quantity of the distribution line.

Amount   The extended price of the distribution line (unit price $\times$ quantity).

Percent   The percentage of quantity or amount on this distribution line.

Location   The internal shipping location.

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Defining and Using ChartFields"

Using the Quick Sourcer

This section provides an overview of the Quick Sourcer and discusses how to:

- Enter parameters for the AutoSelect Requisitions process.

- Enter parameters for the PO Calculations and Create Purchase Order processes.

Understanding the Quick Sourcer

The Quick Sourcer process creates orders from requisitions by creating a material stock request in an organization's inventory stock or creating a purchase order to send to the vendor.

The Quick Sourcer process combines these PeopleSoft Purchasing processes:

AutoSelect Requisitions process (PO_REQSORC)   Applies the priority one vendor to each requisition line.

Build Inventory Demand process (PO_REQINVS)   Checks the organization's inventory stock to see whether the order can be filled internally. This process applies only if PeopleSoft Inventory is installed. If stock is found, the system creates a material stock request in PeopleSoft Inventory, and the requisition is identified as complete. The material stock request ships the required stock to the requester.

PO Calculations process (PO_POCALC)   Verifies that the requisition has been completely filled from inventory stock. If it has not, the process passes the remaining quantity that is needed to the Create Purchase Order process.

| **Create Purchase Order process (PO_CREATE)** | Creates a purchase order for requisition quantities that were not filled by the Build Inventory process. You can set up the system, so that if there is not enough inventory stock, a material stock request is issued for part of the order, and a purchase order is created for the remaining quantity. |

Using the Quick Sourcer with Negative Price Items

For requisitions containing a negative price item, the above processes:

- Do not source to PeopleSoft Inventory, PeopleSoft Strategic Sourcing, or a request for quote (RFQ). You can only source to a purchase order.

- Do not partially source the requisition line.

- Do not reprice to match the system price. (CALC_PRICE_FLG = *N*)

- Do not consolidated with other requisitions. (CONSOLIDATE_FLG = *N*)

- Do not apply contract pricing.

- Do not use the price tolerance fields. (Tolerance/Tolerance Under, % Unit Price Tolerance, and Unit Price Tolerance)

For more information about negative price items, see the "Using a Negative Price on Special Request Pages" section of the "Using Special Requests and Express Forms to Create Requisitions" chapter.

Using the Quick Sourcer with Procurement Contract Functionality

The PeopleSoft eProcurement, PeopleSoft Purchasing, and PeopleSoft Payables applications are integrated with the procurement contract functionality to streamline the use of contacts with requisitions, purchase orders, and vouchers. As part of the contract functionality:

- The system can automatically apply default contract information into a requisition line or you can manually add contract information. Applying contract prices to requisitions enables you to receive contract prices for requisition items and to more accurately track budgets and pre-encumberance balances.

- The system can automatically search for a contract or verifies the existing contract when sourcing a requisition to a purchase order. When sourcing requisitions in batch or processing online purchase orders, the system evaluates system settings to determine whether to check for prices and use a contract on the purchase order.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Requisitions Online," Applying Contracts to Requisitions.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Using Voucher and Order Contracts."

Correcting Errors After the Quick Sourcer Process

When a requisition line is processed by Quick Sourcer, missing or incorrect information can cause the line to be set to the stage status of *Error.* Once the information on the requisition line is corrected and the stage status is set to *Recycled,* then the line can be reprocessed using just the PO Calculation process. For more information about error correction, see *PeopleSoft Enterprise Purchasing 9.1 PeopleBook,* "Using Purchase Order Sourcing" chapter, "Using the Sourcing Workbench" section.

It is important to understand that essential information related to the PeopleSoft eProcurement application resides in companion documentation, especially the *PeopleSoft Enterprise Purchasing 9.1 PeopleBook.* You should be familiar with the contents of this PeopleBook.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Using Purchase Order Sourcing," Correcting Errors.

Pages Used for the Quick Sourcer

Page Name	Definition Name	Navigation	Usage
Selection Criteria	PV_RUN_REQSORC_1	eProcurement, Buyer Center, Quick Source Requisitions, Selection Criteria	Enter parameters for the AutoSelect Requisitions process.
Sourcing Options	PV_RUN_REQSORC_2	eProcurement, Buyer Center, Quick Source Requisitions Click the Sourcing Options tab.	Enter parameters for the PO Calculations process and the Create PO process.
Run Results	RUN_PO_AUTOSRC_LOG	eProcurement, Buyer Center, Quick Source Requisitions Click the Run Results tab.	You may check the results by navigating to the Run Results tab or by using the Process Monitor.

Entering Parameters for the AutoSelect Requisitions Process

Access the Selection Criteria page (eProcurement, Buyer Center, Quick Source Requisitions, Selection Criteria).

Selection Criteria page of the Quick Source Requisitions component

Request Type	Select the type of requisition. Values are:

Request Type   Select the type of requisition. Values are:

Inventory Demand: Processes only the requisition lines for which the Inventory Source check box is selected.

Note. You can select the Inventory Source check box on the Items Definition page.

Purchase Orders: Processes only the requisition lines for which the Inventory Source check box is not selected.

Both Inventory Demand and PO's: Processes both types of requisitions.

Item ID Required   Select to process the requisitions that have a valid item ID that is set for AutoSelect. Define an item for AutoSelect on the Purchasing Attributes - Purchasing Controls page. If this check box is deselected, the Quick Sourcer processes special requests. If the special request does not include a vendor ID, then the requisition line appears with an error status in the purchase order staging tables. If this check box is selected, then all special requests are processed manually using the Requisition Expediter page.

From Business Unit   If you are opting to source by a range of business units, you can elect to put a starting value in the From Business Unit field and an ending value in the To Business Unit field.

From Requisition ID   If you are opting to source by a range of requisitions, you can elect to put a starting value in the From Requisition IDfield and an ending value in the To Requisition ID field.

Requisition Name   Select the name of a specific requisition. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.

Requester   Specify the requester for whom you want to source requisitions.

Buyer   Select a specific buyer for whom to source requisitions to create purchase orders.

Vendor Set ID   Specify the specific vendor set ID for the system to narrow its search.

Vendor ID   Specify the specific vendor ID for the system to narrow its search.

Contract Set ID   If you are sourcing requisitions associated to contracts, you can specify the specific contract set ID for the system to narrow its search.

Contract ID   If you are sourcing requisitions associated to contracts, you can specify the specific contract ID for the system to narrow its search.

Category Set ID   Specify the specific category set ID for the system to narrow its search.

Category   Specify the specific category for the system to narrow its search.

Work Order ID   Select a work order that is associated with sourcing the requisition.

Origin   Select the origin for the purchase order. Origin codes are established on the Origin Codes page and help identify the origins of transactions.

Date Selection

Option	Specify date selection criteria to select the requisition lines with source dates that are within the specified date criteria, as related to the current system date. Values are:
	No Selection by Date.
	Current Date.
	Current Date Minus Days.
	Current Date Plus Days.
	Specified Date.
Operand	Restricts the range to before, equal to, or after the date in the Date field. For example, to select requisitions for sourcing that have source dates for the next three days, select *P* in the Option field, $<=$ in the Operand field, and *3* in the Nbr Days (number of days) field.
Nbr Days (number of days)	The number of days for the before, equal to, and after selection in the Operand field.
Date	Specify the date to use in the date selection criteria. This field is required when you select *S* in the Option field.

See Also

PeopleSoft Enterprise Managing Items 9.1 PeopleBook

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing," Running the AutoSelect Requisitions Process

Entering Parameters for the PO Calculations and the Create Purchase Order Processes

Access the Sourcing Options page (eProcurement, Buyer Center, Quick Source Requisitions. Click the Sourcing Options tab).

Sourcing Options page of the Quick Source Requisitions component

Buyer

Select the buyer to use on the purchase order header in case the PO Calculations process cannot determine the buyer. The buyer name is carried at the line level on the requisition, so a requisition can have multiple buyers.

When the PO Calculations process creates the purchase order header, it must assign a buyer name. If all the staged lines that belong on one purchase order have the same buyer name, the PO Calculations process uses that name on the header. However, if the staged lines that belong on the purchase order have different buyer names, and the process that created the staged entry did not specify a name, the name that you enter here is used on the purchase order header.

Consolidation Method	Determines whether purchase orders are consolidated by business unit, vendor, and buyer, or by business unit and vendor only. The consolidation method applies only to staged rows that are identified for consolidation.
	For example, suppose that you choose to consolidate by business unit and vendor only, then all the rows that belong to the same vendor in each business unit are grouped into one purchase order, even if they have different buyers. Alternately, if you add a buyer to the criteria, purchase orders are built in the same manner. However, they are split between buyers, so that each buyer has a separate purchase order with this configuration.
Lead Time Factor %, Ship to Priority Factor %, Price Factor %, and **Vendor Priority Factor %** (percentage)	These fields are used for flexible sourcing. To override the category and item settings, enter the percentage weight that you want the PO Calculations process to give the factor when the application process evaluates vendors for flexible sourcing. The sum of these factors must be 100 percent.
Origin	Enter an origin to be used on the purchase order.
Purchase Order Date	Enter a date for the purchase order, if a date has not been assigned. If you leave this field blank, the PO Calculations process uses the current system date.
Purchase Order Reference	Enter a purchase order reference for the purchase orders. This is a free-form field.
Pre-Approve Vendor	Select to approve the vendor automatically that the PO Calculations process selects. This option enables you to run the PO Calculations process and the Create Purchase Order process as a unit, without having to approve the vendors.
Build POs as Approved	Select so that the purchase orders that are created when you run the Create Purchase Order process have an *Approved* status. If you select this option, the process examines auto-approval criteria set at the business unit level.
Expedite Staged POs	Select to source all requisitions that are located in the staging table.
Calculate PO Line Numbers	Select to ignore staged entry line numbers when the Create Purchase Order process creates new purchase orders and assigns sequential line numbers, beginning with 1. If you do not select this option, the performance is faster, but you might have purchase orders with nonsequential line numbers that do not begin with *1*.
Hold from Further Processing	Select to place the resultant purchase orders on hold and prevent further processing.
Allow Dispatch When Appr (approved)	Select to make the resultant purchase orders eligible for dispatch.

Note. Users can view the results either by navigating to the Run Results page or by using the Process Monitor PeopleTools, Process Schedule, Process Monitor.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Using Purchase Order Sourcing"

Dispatching Purchase Orders

With PeopleSoft eProcurement, you can:

• Dispatch purchase orders individually or in volume.

• Dispatch from the Online Dispatcher page or using a batch process.

• Dispatch purchase orders using any dispatch method: print, fax, phone, email, or electronic data exchange (EDX). The EDX dispatch method can be used with or without a linked supplier.

The purchase order format determines the layout of the purchase order when it is printed, faxed, attached to an email, or electronically transmitted using EDX. To format the purchase order, you can choose between Oracle XML Publisher and SQR Reports.

For more information, see the "Dispatching Purchase Orders in PeopleSoft eProcurement" chapter of this PeopleBook.

See Also

Enterprise PeopleTools 8.50 PeopleBook: XML Publisher for PeopleSoft Enterprise

Page Used to Dispatch Purchase Orders

Page Name	Definition Name	Navigation	Usage
Dispatch Purchase Orders	PV_PO_MAIN2	eProcurement, Buyer Center, Dispatch Purchase Orders	Select from a range of tasks for sending purchase orders to suppliers.

Running Procurement Processes

This section discusses how to run the procurement processes.

Page Used to Run Procurement Processes

Page Name	Definition Name	Navigation	Usage
Procurement Processes	PV_PO_MAIN3	eProcurement, Buyer Center, Procurement Processes	Perform buyer tasks relating to Purchase Orders.

Running the Procurement Processes

Access the Procurement Processes page (eProcurement, Buyer Center, Procurement Processes).

Procurement Processes

Requisition Selection
Select requisitions for purchase order sourcing.

PO Auto Sourcer
Request process to automatically source purchase orders.

Auto Requisition Selection
Request process to create purchase orders from requisitions.

Inventory Demand
Run inventory demand.

PO Calculations
Run purchase order calculations.

PO Create
Create purchase orders.

Dispatch Purchase Orders
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Change Purchase Order
Run the batch change purchase order process.

Notify Vendors of Attachments
Notify Vendors of attachments for purchase orders

Sourcing Workbench
Analyze the sourcing staging tables.

Requisition Budget Checking
Run Requisition Budget Checking

Requisition Reconciliation
Close requisitions that have been canceled or sourced, either from inventory or through a purchase order

Procurement Processes page (1 of 2)

Procurement Processes page (2 of 2)

Using the Procurement Processes link in the Buyer Center, you can perform buyer tasks relating to purchase orders. To access the Procurement Processes page, select eProcurement, Buyer Center, Procurement Processes. Tasks include:

• Requisition Selection: Select requisitions for purchase order sourcing.

• PO Auto Sourcer (purchase order automatic sourcer): Run the Automatic Purchasing Sourcing process, which enables you to select multiple sourcing processes that you want to run and runs the selected processes in the correct sequence on the same set of records.

• Auto Requisition Selection: Run the AutoSelect Requisitions process to load eligible approved requisitions into the PeopleSoft Purchasing stage tables for purchase order creation and is an alternative to selecting requisitions online using the Requisition Selection - Sourcing page.

• Inventory Demand: Runs the Build Inventory Demand process, which reserves all rows in the staging tables that are identified for inventory demand (Inventory Source option set to Y (yes)), have a stage status of S (staged), and meet the user-defined selection criteria.

• PO Calculation (purchase order calculation): Run the PO Calculations process, which performs most of the processing necessary to create a purchase order. After running the process, you can review results and make changes using the Sourcing Workbench - Selected Items page before the purchase order is created. After you run the PO Calculations process, run the Create Purchase Orders process to create the purchase order.

• PO Create: Run the Create Purchase Orders process to create purchase orders using rows in the staging tables that have been processed by the PO Calculations process. The Create Purchase Orders process maintains the purchase order groupings created by the PO Calculations process to create purchase orders. The Create Purchase Orders process calculates the purchase order ID, assigns line, schedule, and distribution numbers, and creates contract release information.

• Dispatch Purchase Orders: Run the PO Dispatch/Print process and dispatch purchase orders, run the Email process, or run the PO Dispatch & Email multiprocess job.

- Change Purchase Order: Select parameters for and run the Change Purchase Order process.

- Notify Vendors of Attachments: Indicate that you have attached a file to a PeopleSoft eProcurement requisition. The file can be, for example, a Microsoft Word file, an Excel spreadsheet, a Microsoft PowerPoint presentation, or a Microsoft Visio diagram. The requester and buyer can view these attachments. The attachment is automatically added to the purchase order that is created from the requisition and can be sent to the vendor.

- Sourcing Workbench: Access the Sourcing Workbench component, where you can view the results of each sourcing step. Using the workbench you view staged rows, along with any errors accompanying them. You can also use the workbench to transfer from the staged row to the source transaction data, change the status of the source record, correct the source, and recycle the staged row for reprocessing.

- Requisition Budget Checking: Access the Requisition Budget Checking component to run Requisition Budget Checking.

- Requisition Reconciliation: Run the Requisition Reconciliation process to close requisitions that are fully canceled or fully sourced and no longer need to be modified. When the process runs, it reconciles requisition-related settings and statuses to change the status of applicable requisitions to *C* (completed).

- Requester's Workbench: Access the Requester's Workbench where you can retrieve, review and modify multiple requisitions using functions such as update a requisition or maintaining distributions on a requisition. You can also approve, budget check, or cancel requisitions.

- PO Budget Check Request: Access the PO Budget Check Request where you can check the budget for the purchase order.

- Reconcile Purchase Orders: Run the PO RECON process (PO_PORECON) to close qualifying purchase orders that you no longer need to modify. When the PO RECON process runs, it reconciles various purchase order-related settings and statuses to change the status applicable purchase orders to *C* (completed).

- Buyer's Workbench: Access the Buyer's Workbench where you can retrieve, review, and modify multiple purchase orders. You can also approve, budget check, or cancel purchase orders.

- Purge Change Requests: Access the Purge Change Requests process page where you can launch the PO_POCHGPRG process to purge completed and error rows from the Change Request tables in PeopleSoft Purchasing.

- Purge Stage Tables: Access the Purge Stage Tables process page where you can launch the PO_POSTGPRG process to purge entries on the PeopleSoft Purchasing staging tables.

- Process Monitor: Monitor the process and status of requisition and purchase order processes.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Understanding Purchase Orders"

Accessing Vendor Tables, Item Tables, and Return to Vendor

This section lists the pages used to access vendor tables, item tables, and returns to vendors.

Pages Used to Access Vendor Tables, Item Tables, and Returns to Vendors

Page Name	Definition Name	Navigation	Usage
Vendors	none	eProcurement, Buyer Center, Vendors	Access vendor tables. See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Maintaining Vendor Information."
Maintain Items	PV_ADM_DEFINE_ITEM	eProcurement, Buyer Center, Maintain Items	Access PeopleSoft item tables. See *PeopleSoft Enterprise Managing Items 9.1 PeopleBook.*
Return to Vendors	none	eProcurement, Buyer Center, Return to Vendors	Access the return to vendor pages. See Chapter 17, "Receiving Stock and Returning Items to Vendors," Returning Items to Vendors, page 484.

Accessing Inquiries and Reports

This section discusses how to access inquiry pages and reports.

Page Used to Access Inquiries and Reports

Page Name	Definition Name	Navigation	Usage
Inquiries and Reports	PV_RPT_MAIN	eProcurement, Buyer Center, Inquiries and Reports	Access inquiry pages and reports for requisitions, purchase orders, and items.

Accessing Inquiry Pages and Reports

Access the Inquiries and Reports page (eProcurement, Buyer Center, Inquiries and Reports).

Inquiries

PO Inquiry
Inquire on purchase order details.

PO Activity Summary
Inquire on purchase order activities.

PO Change History
Inquire on purchase order change history.

Reports

Expediting Report
Provides purchase order details such as late days and due date sorted by buyer, vendor, or due dates.

PO Listing Report
Provides purchase order information sorted by purchase order date, vendor, buyer, or status.

PO Status Listings
Provides purchase order status information sorted by vendor or item.

PO Detail Listings
Provides detailed purchase order information sorted by purchase order date, vendor, or buyer.

PO Schedule Listings
Provides purchase order schedule information such as ship to and due date sorted by purchase order date, vendor, or buyer.

PO To Requisition Xref
Provides a cross reference between requisitions and the purchase orders created from those requisitions.

PO Item Category Usage
Provides purchase order item usage information by catalog or vendor.

Requisition To PO Xref
Provides information about selected requisitions and the purchase orders that were created from them.

Inquiries and Reports page (partial page)

See Also

Generating and Viewing PeopleSoft eProcurement Information

This section discusses how to generate and view PeopleSoft eProcurement information.

In addition to the standard reports and inquiries that PeopleSoft applications provide, PeopleSoft eProcurement provides transactional analysis graphs. These graphs can be displayed as bar graphs, pie charts, line graphs, or histograms. These graphs enable you to view information about PeopleSoft eProcurement requisition and purchase order transactions. Four graphs are delivered with PeopleSoft eProcurement:

PO Status Analysis	Provides information about the current state of purchase orders by displaying the number of purchase orders in each purchase order status.
PO Value Analysis	Provides information about the total purchase order costs by item category or ship-to location.
Requisition Status Analysis	Provides information about the current state of the requisitions by displaying the number of requisitions in each requisition status.
Vendor Analysis by Categories	Provides information about total quantities and amounts received from vendors.

PO Status Analysis Graph

This graph displays the number of purchase orders that are currently in each purchase order status. The graph displays information for only one PeopleSoft Purchasing business unit at a time. Within the business unit, you can further limit the purchase orders that appear to one vendor and one buyer.
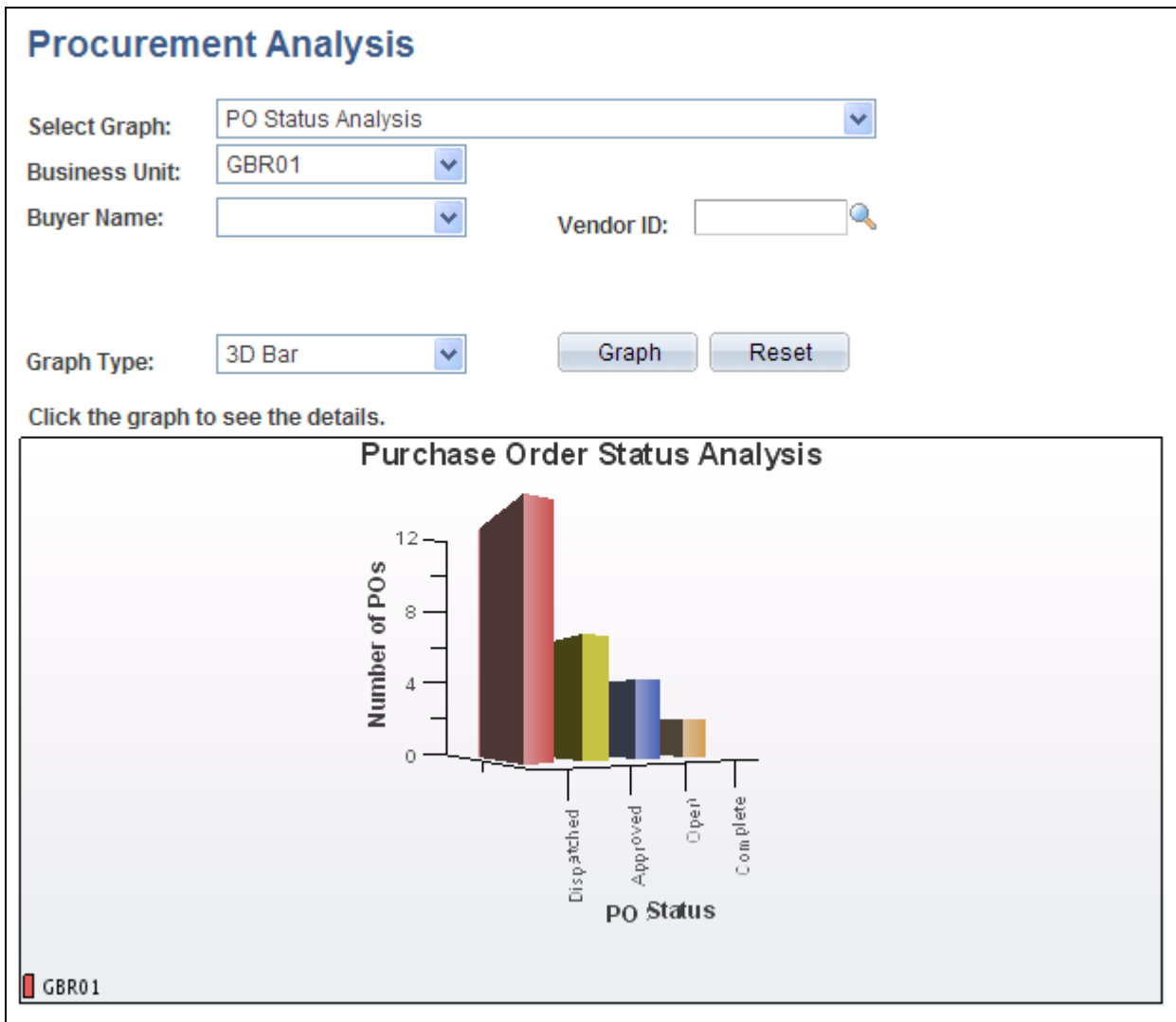
PO Status Analysis three-dimensional bar graph generated in PeopleSoft eProcurement.

PO Value Analysis Graph

This graph displays the total monetary amount of the purchase orders. This information can be processed by item category (using the purchase order line level), Ship To code, Location code, or Department ID (using the purchase order distribution line level). The method is noted at the top of the graph. The graph displays information for only one PeopleSoft Purchasing business unit at a time. Within the business unit, you can further limit the purchase orders that appear to one vendor and one buyer.

Procurement Analysis

Select Graph: PO Value Analysis

Business Unit: GBR01

Buyer Name: Vendor ID:

By Amt/Qty: Amount

Analysis by: Department ID

Graph Type: 2D Bar   Graph   Reset

Click the graph to see the details.

Total Amount by Dept ID

GBR01
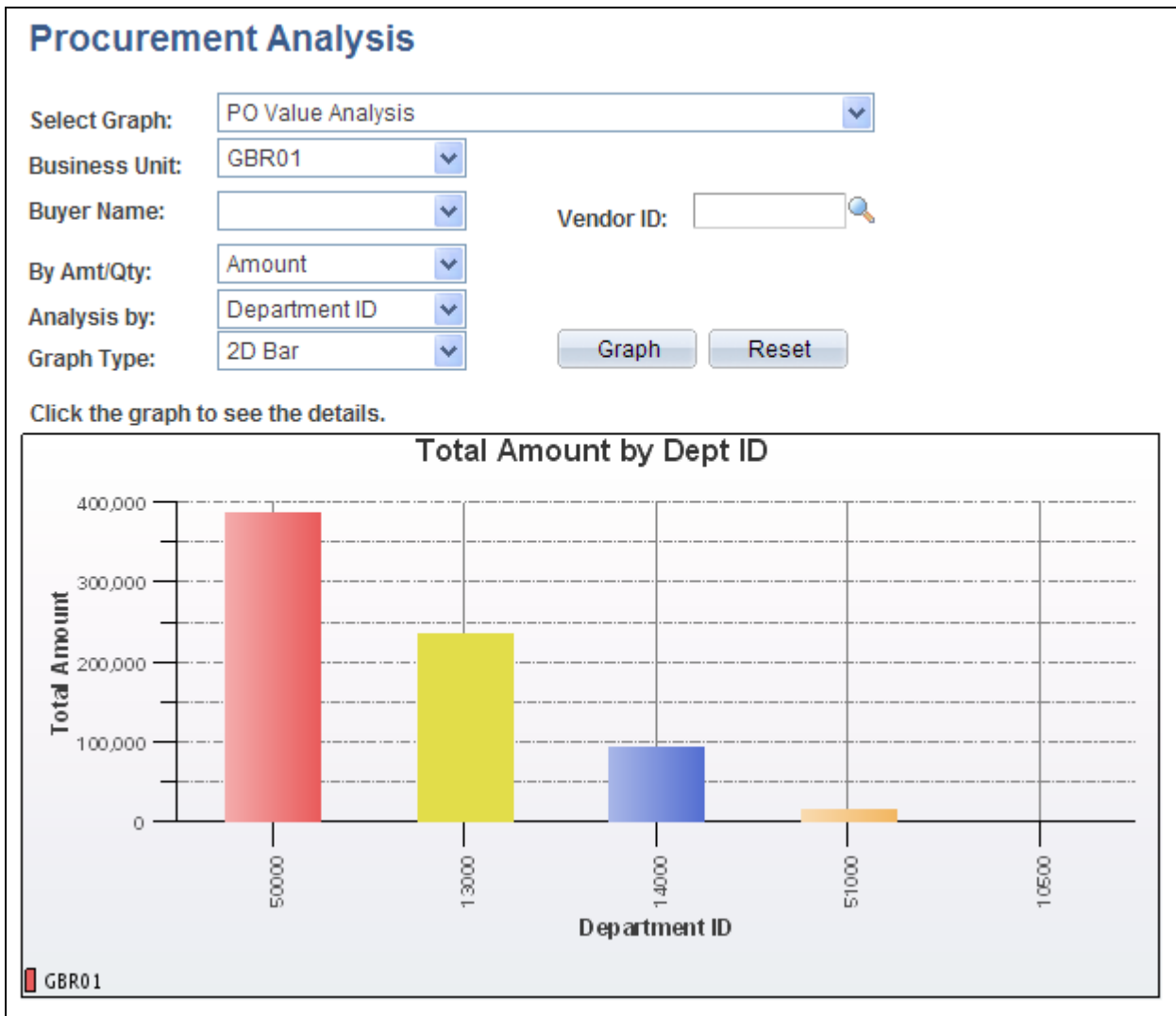
PO Value Analysis two-dimensional bar graph generated in PeopleSoft eProcurement.

Requisition Status Analysis Graph

This graph displays the number of requisitions that are currently in each requisition status. The graph displays information for only one PeopleSoft Purchasing business unit at a time. Within the business unit, you can further limit the requisitions that appear to one requester.

Procurement Analysis

Select Graph:	Requisition Status Analysis ⌄
Business Unit:	US100 ⌄
Requester Name:	KELLYJONES ⌄

Graph Type:	2D Line ⌄	Graph	Reset

Click the graph to see the details.

Requisition Status Analysis
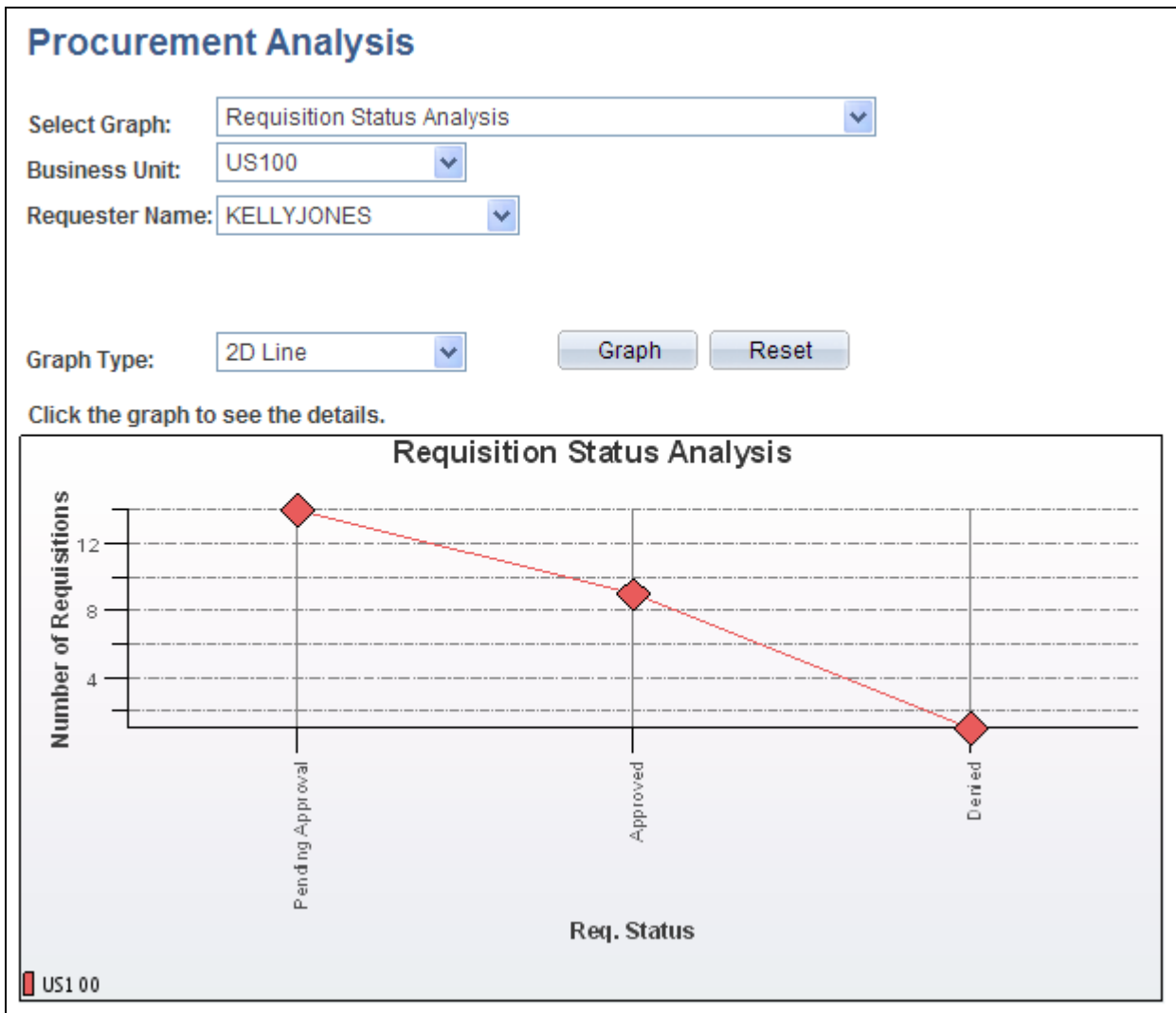
Requisition Status Analysis line graph generated in PeopleSoft eProcurement.

Vendor Analysis by Categories Graph

This graph displays the quantity or amount of goods that a vendor supplies to a business unit for a specific category using the Vendor Analysis by Categories graph. The system totals the monetary value to arrive at an amount value from each vendor or it totals the number of units to arrive at a quantity from each vendor.
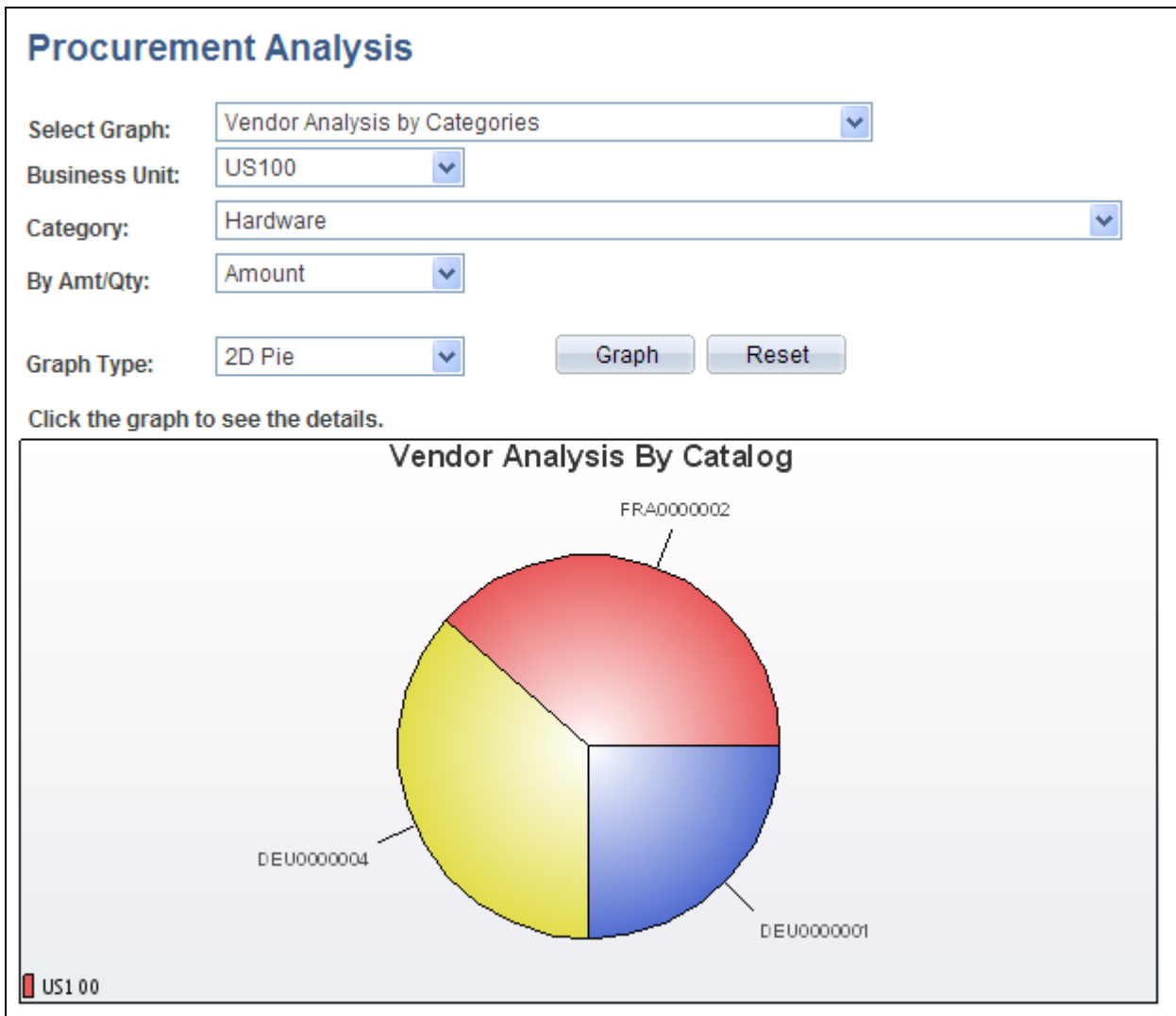
Vendor Analysis by Categories two-dimensional pie chart generated by PeopleSoft eProcurement.

Page Used to Generate and View PeopleSoft eProcurement Information

Page Name	Definition Name	Navigation	Usage
Procurement Analysis	PV_GRAPH_MAIN	eProcurement, Buyer Center, Analyze Procurement Data	Generate and view PeopleSoft eProcurement information in transactional analysis graphs using requisition and purchase order information.

Generating and Viewing PeopleSoft eProcurement Information

Access the Procurement Analysis page (eProcurement, Buyer Center, Analyze Procurement Data).

Procurement Analysis page

Select Graph	Select one of the four delivered graphs.
Business Unit	The PeopleSoft Purchasing business unit containing the requisitions or purchase orders that are used to build the graph. The system uses the business unit that is specified on the User Preferences - Overall Preferences page as the default.
Vendor ID	Select a vendor ID to restrict the graph information to one vendor. This field does not appear if you selected the Req. Status Analysis graph option.
Buyer Name	Select a buyer name to restrict the graph information to one buyer. The buyers are those that are authorized for the user ID on the User Preferences - Procurement Page: Purchase Order Authorizations page. This field does not appear if you selected the Req. Status Analysis option.
By Amt/Qty (by amount or quantity)	Determine if you want the graph to sort by amount or quantity.
Analysis By	Select how you wish to sort the analysis. • *Department ID* • *Item Category* • *Location* • *Ship To*
Graph Type	Select the type of graph used to display the results.
Graph	Click to generate the transactional analysis graph.
Reset	Click to delete the entries on this page. Then you can enter new criteria for generating the next graph.

See Also

Chapter 4, "Determining Functional Implementation Options," Defining User Preferences for PeopleSoft eProcurement, page 96

Chapter 14

Dispatching Purchase Orders in PeopleSoft eProcurement

This chapter provides an overview of purchase order dispatch and discusses how to:

*   Dispatch purchase orders.

*   Format purchase orders with Oracle XML Publisher.

*   Set up dynamic dispatching.

*   Set up and send POs to vendors by EDX (electronic data exchange).

*   Access the Service Operations Monitor and Process Monitor components.

Understanding Purchase Order Dispatch

With PeopleSoft eProcurement, you can dispatch purchase orders individually or in volume. You can dispatch from the online page or through a batch process. A purchase order must have a status of *Approved* or *Dispatched* and have passed the commitment control budget check to be eligible for dispatch.

You can dispatch purchase orders in PeopleSoft eProcurement using any of the following dispatch methods: print, fax, phone, email, or electronic data exchange (EDX). The EDX dispatch method can be used with or without a linked supplier.

The purchase order format determines the layout of the purchase order when it is printed, faxed, attached to an email, or electronically transmitted using EDX. To format the purchase order, you can choose between:

*   *Oracle XML Publisher:* The XML Publisher gives you the flexibility of changing the purchase order formats by choosing different report template IDs for different types of purchase orders. The template ID for dispatched purchase order can be defined at the system-level, business unit level, or on the run control for the dispatch process. To use the XML Publisher for purchase orders in both PeopleSoft eProcurement and PeopleSoft Purchasing, select the Enable XML Publisher check box on the Purchasing page of the Installation Options component.

    See *Enterprise PeopleTools 8.50 PeopleBook: XML Publisher for PeopleSoft Enterprise*

*   *SQR Report:* The SQR programming language is the default method used to format purchase orders. To use SQR report for purchase orders in both PeopleSoft eProcurement and PeopleSoft Purchasing, unselect the Enable XML Publisher check box on the Purchasing page of the Installation Options component.

Dispatch Methods Within PeopleSoft eProcurement

Both PeopleSoft eProcurement and PeopleSoft Purchasing provide several different dispatch methods depending on your business needs. The dispatch method for purchase orders uses a default from the Purchasing Options - Purchasing Processing Options page or the Vendor Information - Procurement Options page. You can change the dispatch method on the purchase order manually.

The following diagram illustrates the dispatch methods for PeopleSoft eProcurement, including print, fax, electronic data exchange (EDX), email, and phone.
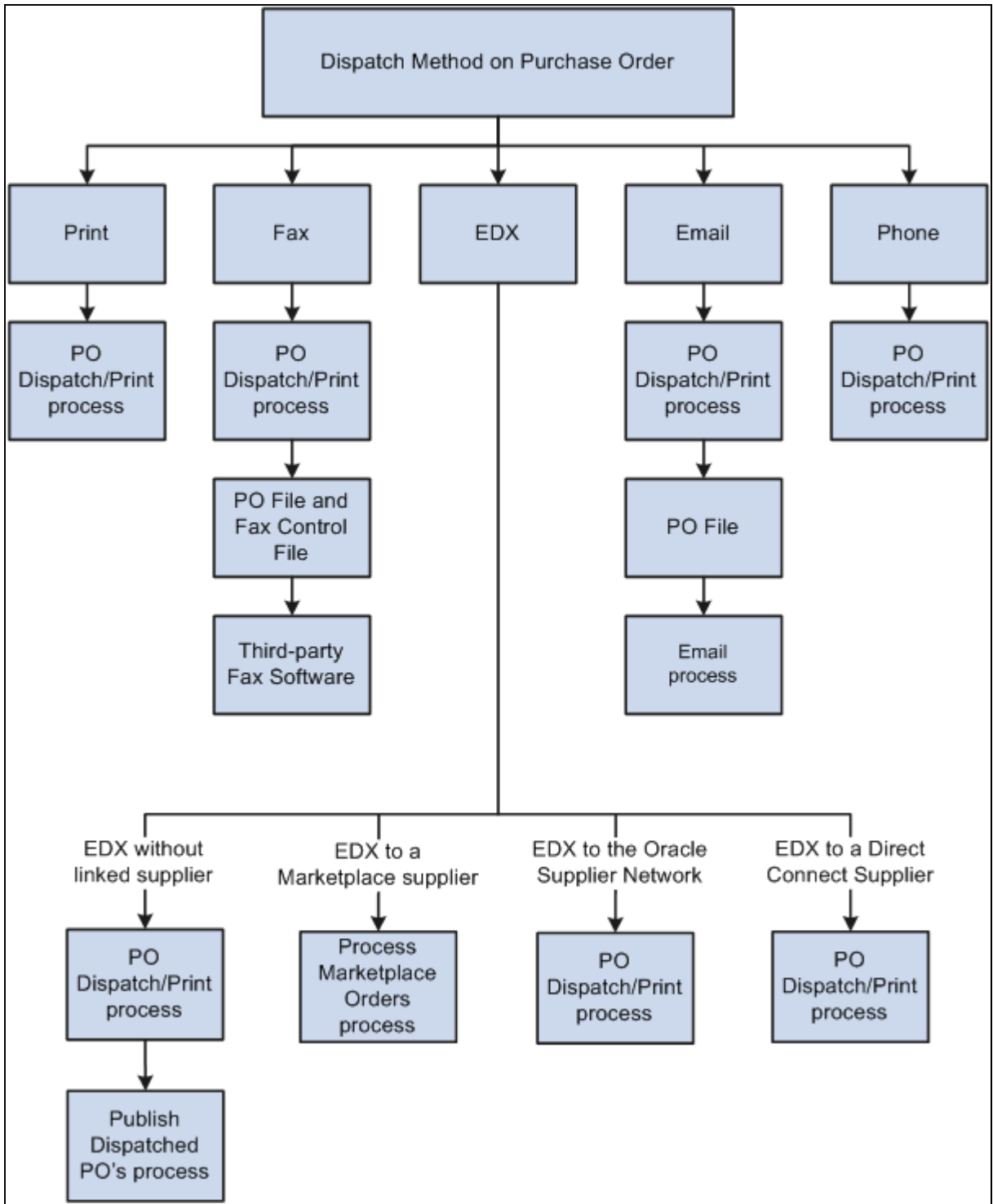
Dispatching a purchase order in PeopleSoft eProcurement

The dispatch methods available in PeopleSoft eProcurement are:

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Print   A purchase order with the dispatch method of *Print* uses the dispatch process to print the purchase order and set the purchase order status to *Dispatched.* You can choose to format the printed purchase order using the SQR report (default) or XML Publisher.

Fax   A purchase order with the dispatch method of *Fax* uses the dispatch process to set the purchase order status to *Dispatched* and create two files; a purchase order file and a fax control file. These files are created in the location that you specify on the File Locations page (Set Up Financials/Supply Chain, Common Definitions, File Locations and Images, File Locations). In addition, the fax dispatch method requires a third-party fax software to handle the output files. A purchase order cannot be dispatched using fax if the fax number is not available on the purchase order or the vendor profile. Please check the log file for those purchase orders that are not dispatched.

For more information about dispatching by fax, see the PeopleSoft Enterprise Source to Settle Common Information PeopleBook, "Defining Procurement Options" chapter, "Preparing to Dispatch by Fax and Email" section.

Email   A purchase order with the dispatch method of *Email* uses the dispatch process to set the purchase order status to *Dispatched* and to create a purchase order file in the location that you specify on the File Locations page. The Email process (PO_PO_EMAIL) picks up the output file from the specified location and sends out an email message with the purchase order as an attachment.

For more information about dispatching by email, see the PeopleSoft Enterprise Source to Settle Common Information PeopleBook, "Defining Procurement Options" chapter, "Preparing to Dispatch by Fax and Email" section.

The Email process sends the email to the address that you specify in the Email ID field on the Vendor Information - Contacts page. If you do not specify a vendor contact on the purchase order, the Email process sends the email to the address that you specify in the Email ID field on the Vendor Information - Address page. A purchase order cannot be dispatched using email if the email ID is not available on the purchase order or the vendor profile. Please check the log file for those purchase orders that are not dispatched. When a message is sent successfully, it is removed from the email queue table; however, the purchase order output files are not deleted.

Note. The email dispatch method is designed to work with a SMTP gateway. The settings for the SMTP gateway must be entered when you set up a PeopleSoft Process Scheduler server.

Phone   A purchase order with the dispatch method of *Phone* uses the dispatch process to change the purchase order status to *Dispatched.*

EDX	A purchase order with the dispatch method of *EDX* uses the dispatch process to update a series of EC outbound staging tables, including; PS_PO_HDR_OUT_EC, PS_PO_LINE_OUT_EC, and PS_PO_SHIP_OUT_EC. A service operation within the PeopleSoft Integration Broker is required to deliver purchase orders to the recipients through designated channels. The publishing of the outbound data (using a service operation) is sometimes a separate process and sometimes combined with the initial process.
	There are several ways to dispatch an EDX purchase order depending on the supplier setup and destination of the purchase order. The EDX dispatch methods are explained below.

The EDX dispatch methods available in PeopleSoft eProcurement are:

EDX without a linked supplier	A purchase order is transmitted to a supplier who is not defined as a linked supplier in PeopleSoft eProcurement by:
	1. Using the dispatch process to update a series of EC outbound staging tables.
	2. Using the Publisher page (eProcurement, Buyer Center, Dispatch Purchase Orders, Publisher) to initiate the outbound message publish process for purchase orders. The publish process converts the purchase orders in the EC outbound staging tables into an eXtensible Markup Language (XML) message using the PURCHASE_ORDER_DISPATCH service operation and transmits the XML message directly to the vendor.
EDX to a Marketplace supplier	A Marketplace is an electronic trading community in which buyers and sellers use a common internet portal. When you connect PeopleSoft eProcurement to a Marketplace, you can pass purchase orders from PeopleSoft eProcurement and PeopleSoft Purchasing to a Marketplace where suppliers receive the orders and review them. In order to use this method, the vendor must be set up as a marketplace supplier in PeopleSoft eProcurement, including on the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers). For more information on setting up a Marketplace supplier, see the "Integrating with a Marketplace" chapter of this PeopleBook.
	Purchase orders are dispatched and transmitted to the Marketplace using the Process Marketplace Orders process (eProcurement, Buyer Center, Dispatch Purchase Orders, Marketplace). The Process Marketplace Orders process (PV_MS_PO_SEL) is an application engine process that dispatches the purchase orders and publishes them to the Marketplace using the PV_ORDER service operation within the PeopleSoft Integration Broker. You must use the xCBL 2.0 format to use this process.
	See

EDX to the Oracle Supplier Network

The Oracle Supplier Network (OSN) is an hosted service offering in which buyers and sellers use a common hub for exchanging and monitoring transactions. The following transactions are used in the integration to OSN; purchase orders, purchase order acknowledgements, change orders, advanced shipping notices, and invoices. When you connect PeopleSoft eProcurement to the Oracle Supplier Network, you can pass purchase orders from PeopleSoft eProcurement and PeopleSoft Purchasing to OSN, OSN passes the purchase orders to the suppliers who receive the orders and review them. In order to use this method, you must first setup the integration to OSN and define your vendors as an OSN supplier on the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers). For more information on integrating with the Oracle Supplier Network, see the "Integrating with the Oracle Supplier Network" chapter of this PeopleBook.

Purchase orders are dispatched and transmitted to the Oracle Supplier Network using the dispatch process to update the EC outbound staging tables. The purchase orders are published to OSN using the PV_ORDER service operation and the ORACLE_SN_ORDER routing within the PeopleSoft Integration Broker.

EDX to a Direct Connect Supplier

Direct connect enables PeopleSoft purchase orders to be dispatched directly to the supplier's website. If a vendor is defined as a direct connect supplier in PeopleSoft eProcurement, including on the Linked Suppliers page (eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers), the system dispatches purchase orders associated with that vendor and electronically transmits them to the direct connect supplier using the cXML or xCBL formats. For more information on setting up a direct connect supplier, see the "Integrating with Direct Connect Suppliers" chapter of this PeopleBook.

A direct connect purchase order with the dispatch method of *EDX,* uses the dispatch process to update the EC outbound staging tables. The dispatch process then publishes the purchase orders to the supplier's website using the PV_ORDER_REQ service operation within the PeopleSoft Integration Broker.

Using Dynamic Dispatch with the EDX Dispatch Method

The Dynamic Dispatch feature enables you to quickly adjust the structure of your outbound purchase order message to match different online XML standards of third-party systems. If the vendor is defined to use a EDX dispatch method on the Linked Supplier Setup page, the purchase order is dispatched and electronically transmitted to the correct website by using PeopleSoft Integration Broker. PeopleSoft Integration Broker makes it possible for you to adjust quickly to meet different online XML marketing standards that might be implemented by a supplier without making code changes.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information," Entering Vendor Identifying Information

Dispatching Purchase Orders

This section discusses how to:

- Use the Dispatch Purchase Orders page.

- Select POs manually for dispatch.

- Use batch processing to dispatch POs.

- Send dispatched POs to vendors.

- Dispatch POs to the marketplace.

- View PO statuses and messages.

- View messages entered on PO lines.

Pages Used to Dispatch Purchase Orders

Page Name	Definition Name	Navigation	Usage
Dispatch Purchase Orders	PV_PO_MAIN2	eProcurement, Buyer Center, Dispatch Purchase Orders	Select from a range of tasks for sending purchase orders to suppliers.

Page Name	Definition Name	Navigation	Usage
Online Dispatcher	PV_PO_DISPATCH	Click the Online Dispatcher link on the Dispatch Purchase Orders page.	Select purchase orders for manual online dispatch using this page. The system launches PeopleSoft processes in the background to dispatch and, if needed, email and publish XML messages. If you are formatting your purchase orders using SQR, then this page only dispatches purchase orders using the EDX dispatch method with a linked supplier. If you are formatting your purchase orders using Oracle XML Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX.
Batch Dispatcher	PV_PO_DIS_BATCH	Click the Batch Dispatcher link on the Dispatch Purchase Orders page.	Run the process to dispatch your purchase orders. When needed, this page also publishes the EDX message or runs the Email (PO_PO_EMAIL) process. If you are formatting your purchase orders using SQR, then this run control page only dispatches purchase orders using the EDX dispatch method with a linked supplier. If you are formatting your purchase orders using Oracle XML Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this run control page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX.

Page Name	Definition Name	Navigation	Usage
General Batch Dispatcher	RUN_DISP_POPO005	Click the General Batch Dispatcher link on the Dispatch Purchase Orders page.	Run the PO Dispatch/Print (POPO005) process to dispatch your purchase orders. For some dispatch methods, this page also publishes the EDX message or runs the Email (PO_PO_EMAIL) process. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. **Note.** This page only displays when you are using SQR to format your purchase orders (the Enable XML Publisher check box has not been selected on the Purchasing page of the Installation Options component). This page enables you to dispatch using any dispatch method within PeopleSoft eProcurement.
Publish Dispatched POs	PV_IN_RUN_PUB_MSG	Click the Publisher link on the Dispatch Purchase Orders page.	Use this process page to electronically transmit the dispatched POs to vendors using the Publish Outbound Message process. This page only applies to dispatched purchase orders using the EDX method without a linked supplier.
Process Marketplace Orders	PV_MS_PO_SEL_RUN	Click the Marketplace link on the Dispatch Purchase Orders page.	Run the Process Marketplace Orders (PV_MS_PO_SEL) process to dispatch and publish purchase orders to a marketplace. This process only applies to purchase orders with a marketplace supplier.
PO Dispatch Message Log	PV_MS_PO_DISP_ERR	Click the Dispatch Message Log link on the Dispatch Purchase Orders page.	View PO statuses and messages after running the dispatch process.

Page Name	Definition Name	Navigation	Usage
PO Lines Dispatch Message Log	PV_MS_PO_DISP_ERR	Click the Dispatch Message Log link on the PO Dispatch Message Log page.	View messages entered on PO lines.
Publish Monitor	IB_MONITOR_OVRVIEW	Click the Publish Monitor link on the Dispatch Purchase Orders page.	Use the Service Operations Monitor component to monitor the electronic transmission of your purchase orders to a vendor, marketplace, or vendor's website. The PeopleSoft Integration Broker uses service operations to transmit these messages. You can monitor system service operation queues, review the delivery status of individual service operation messages, and identify any processing errors that need resolution. The Service Operations Monitor is generally used by system administrators. See Chapter 14, "Dispatching Purchase Orders in PeopleSoft eProcurement," Accessing the Service Operations Monitor and Process Monitor Components, page 398.
Process Monitor	PMN_PRCSLIST	Click the Process Monitor link on the Dispatch Purchase Orders page.	Review the status of scheduled or running PeopleSoft processes. You can view all processes to see the status of any job in the queue and control processes that you initiated. See Chapter 14, "Dispatching Purchase Orders in PeopleSoft eProcurement," Accessing the Service Operations Monitor and Process Monitor Components, page 398.

Dispatching Purchase Orders

Access the Dispatch Purchase Orders page (eProcurement, Buyer Center, Dispatch Purchase Orders).

Dispatch Purchase Orders

Online Dispatcher
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Batch Dispatcher
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Publisher
Publish dispatched purchase orders.

Marketplace
Dispatch and Publish 'EDX' purchase orders, using xCBL 2.x only.

Dispatch Message Log
View error messages for the purchase order dispatch process.

Publish Monitor
Monitor application messaging.

Process Monitor
View the process monitor.

Dispatch Purchase Orders page with XML Publisher enabled to format purchase orders

Dispatch Purchase Orders

Online Dispatcher
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Batch Dispatcher
Dispatch and Publish 'EDX' purchase orders in batch.

General Batch Dispatcher
Dispatch purchase orders via Email, Fax, Print, EDX, etc.

Publisher
Publish dispatched purchase orders.

Marketplace
Dispatch and Publish 'EDX' purchase orders, using xCBL 2.x only.

Dispatch Message Log
View error messages for the purchase order dispatch process.

Publish Monitor
Monitor application messaging.

Process Monitor
View the process monitor.

Dispatch Purchase Orders page with SQR used to format purchase orders

Using the Dispatch Purchase Orders page, you can select from a range of tasks for sending purchase orders to suppliers. The Dispatch Purchase Orders page displays different options based on your selection of the Enable XML Publisher check box on the Purchasing page of the Installation Options component. When this check box is selected, the Oracle XML Publisher is used to format and print purchase orders in PeopleSoft eProcurement and PeopleSoft Purchasing. When this check box is not selected, the SQR programming language is used to format purchase orders. Choosing the Oracle XML Publisher gives you the flexibility of changing the purchase order formats by choosing different report template IDs for different types of purchase orders. The template ID for dispatched purchase order can be defined at the system-level, business unit level, or on the run control for the dispatch process.

Using the Dispatch Purchase Orders page, you can select the following links:

| Link on Dispatch Purchase Orders page	Action With XML Publisher	Action With SQR
Online Dispatcher	Access the Online Dispatcher page (PV_PO_DISPATCH) where you can dispatch purchase orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders.	Access the Online Dispatcher page (PV_PO_DISPATCH) where you can dispatch purchase orders using only the EDX dispatch method with linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders.
Batch Dispatcher	Access the Dispatch Purchase Orders run control page where you can select criteria to dispatch purchase orders. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. The PeopleSoft Job POXMLP is used to dispatch purchase orders. In addition, you can use this run control to change the report template ID used by the XML Publisher to generate purchase orders.	Access the Batch Dispatcher run control page where you can select criteria to run the dispatch process. You can only dispatch purchase orders using the EDX dispatch method with linked suppliers. The PeopleSoft Application Engine process PV_DISPATCH is used to dispatch purchase orders.
General Batch Dispatcher	(does not display when XML Publisher is enabled)	Access the Dispatch Purchase Orders run control page where you can select criteria to dispatch purchase orders. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers. The SQR process PO Dispatch/Print (POPO005) is used to dispatch purchase orders.

Link on Dispatch Purchase Orders page	Action With XML Publisher	Action With SQR
Publisher	This page only applies to dispatched purchase orders using the EDX method without a linked supplier. Access this run control page to define selection criteria to publish dispatched purchase orders that are in the outbound staging tables and that use the batch publish design pattern. You can specify whether to send purchase orders based on business unit or vendor. This Publish Outbound Message process generates a Purchase Order Dispatch EIP transaction. See *PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook*, "Scenarios for Integration With PeopleSoft Supply Chain Management," Example: Processing the Purchase Order Dispatch EIP.	(same as previous column)
Marketplace	Dispatch and publish purchase orders with Marketplace suppliers.	(same as previous column)
Dispatch Message Log	Access the PO Dispatch Message Log page to view the outbound purchase order messages.	(same as previous column)
Publish Monitor	Use the Publish Monitor to review information about the delivery status of individual service operation messages and to help resolve processing errors.	(same as previous column)
Process Monitor	Use the Process Monitor to review the status of scheduled or running PeopleSoft processes. You can view all processes to see the status of any job in the queue and control processes that you initiated.	(same as previous column)

Note. To prevent end-user error, it is recommended that you use PeopleTools to remove from view on the run control's Process Scheduler Request page the dispatch process that is not used by your organization. For example, if you choose to enable the XML Publisher for formatting purchase orders, then it is recommended that you remove the POPO005 SQR process from viewing on the dispatch run controls because this SQR process is never used.

See Also

Enterprise PeopleTools 8.50 PeopleBook: XML Publisher for PeopleSoft Enterprise

Selecting POs Manually for Dispatch

Access the Online Dispatcher page (eProcurement, Buyer Center, Dispatch Purchase Orders, Online Dispatcher).

Online Dispatcher page with Oracle XML Publisher enabled

Online Dispatcher page with SQR enabled

Use the Online Dispatcher page to select purchase orders for manual online dispatch. The system launches PeopleSoft processes in the background to dispatch and, if needed, email and publish XML messages. If you are formatting your purchase orders using SQR, then this page only dispatches purchase orders using the EDX dispatch method with a linked supplier (Oracle Supplier Network, marketplace or Direct Connect). If you are formatting your purchase orders using Oracle XML Publisher (select the Enable XML Publisher check box on the Purchasing page of the Installation Options component), then use this page to dispatch purchase orders with any dispatch method: print, fax, email, phone, or EDX. If this PO is being sent to a direct connect supplier, this page sends the PO directly to the vendor's website.

Business Unit	Select the Purchasing business unit containing the purchase orders that you want to dispatch.
Buyer	Select a buyer to narrow the selection of purchase orders displayed in the PO Listing group box.
Dispatch Method	Select a dispatch method to narrow the selection of purchase orders displayed in the PO Listing group box. If the Oracle XML Publisher has been enabled, you can choose any dispatch method: print, fax, email, phone, or EDX. If SQR is used to format your purchase orders (that is, the Oracle XML Publisher has not been enabled), then this page is limited to purchase orders using the EDX dispatch method with a linked supplier.
Date From and **Date To**	Enter a date range to narrow the selection of purchase orders displayed in the PO Listing group box.
Vendor	Enter a vendor ID to display only purchase orders for this vendor.

Include Dispatched PO(s)	Select this check box to include purchase orders that have already been dispatched. This enables you to re-dispatch them if needed. Unselect this check box to display only *Approved* purchase orders.
Linked Supplier(s) Only	Select to limit the purchase orders displayed to orders with linked suppliers. Linked suppliers are marketplace suppliers and direct connect suppliers (Punchout and Roundtrip). If SQR is used to format your purchase orders (that is, the Oracle XML Publisher has not been enabled), then this page is limited to purchase orders using the EDX dispatch method with a linked supplier.
Search	Click this button to initiate your search and display purchase orders in the PO Listing group box that meet your search criteria. The system only selects purchase orders with a PO Status of *Approved, Dispatched,* or *Pending Cancel.*
Clear	Click this button to erase your search criteria.
Sel	Select this check box for each individual purchase order that you want to dispatch using this page.
Dispatch PO(s)	Click this button to automatically dispatch the purchase orders selected above.

Using Batch Processing to Dispatch POs

Access the Batch Dispatcher page (eProcurement, Buyer Center, Dispatch Purchase Orders, Batch Dispatcher).

Batch Dispatcher page with Oracle XML Publisher enabled

The Batch Dispatcher page with Oracle XML Publisher enabled runs the PeopleSoft Job POXMLP to dispatch your purchase orders. This process can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers.

For field definitions on this run control page, see the PeopleSoft Enterprise Purchasing PeopleBook, "Dispatching and Printing Purchase Orders" chapter, "Dispatching Purchase Orders" section.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Dispatching and Printing Purchase Orders," Running the PO Dispatch/Print Process.

Batch Dispatcher page with SQR enabled

The Batch Dispatcher page (with SQR enabled) runs the PV_DISPATCH process. This process only dispatches purchase orders using the EDX dispatch method with link suppliers. The field definitions are:

Business Unit	Select a specific business unit from which to dispatch POs using batch processing.
Buyer Name	Select a specific buyer from whom to dispatch POs using batch processing.
Vendor ID	Select a specific vendor to which you want to dispatch POs using batch processing. If you leave the field empty, POs for all vendors that meet other criteria that you enter are included in the batch processing.
From Date and **Through Date**	Enter a date range to narrow the selection of purchase orders to be dispatched by this process.

Using the General Batch Dispatcher Page

Access the Dispatch Purchase Orders process page (eProcurement, Buyer Center, Dispatch Purchase Orders, General Batch Dispatcher).

The General Batch Dispatcher process page with SQR enabled

Run the PO Dispatch/Print (POPO005) process to dispatch your purchase orders. You can dispatch orders using any dispatch method: print, fax, email, phone, EDX with linked suppliers, and EDX without linked suppliers.

Note. This page only displays when you are using the SQR Reports to format your purchase orders (the Enable XML Publisher check box has not been selected on the Purchasing page of the Installation Options component). This page enables you to dispatch within PeopleSoft eProcurement using any dispatch method.

For field definitions on this run control page, see the PeopleSoft Enterprise Purchasing PeopleBook, "Dispatching and Printing Purchase Orders" chapter, "Dispatching Purchase Orders" section.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Dispatching and Printing Purchase Orders," Running the PO Dispatch/Print Process.

Sending Dispatched POs to Vendors

Access the Publish Dispatched POs page (eProcurement, Buyer Center, Dispatch Purchase Orders, Publisher).

Publish Dispatched PO page

Use this page to launch the Publisher (IN_PUB_MSGIN_PUB_MSG) process. This is a PeopleSoft Application Engine process that electronically transmits the purchase orders using the EDX dispatch method without a linked supplier.

Request ID	Enter an identifier for this process run.
Selection Type	Select a criteria for selecting POs to publish. The selection determines the access to other fields on this page. Values are:
	Select BU (select business unit): Select by business unit.
	Select Ven (select vendor): Select by vendor ID.

If you select the selection type, *Select BU,* define these settings:

BU Selection	*1 Bus Unit* (one business unit): Select to publish POs to vendors that are associated with a specific business unit.
	All BUs: Select to publish POs to vendors that are associated with all business units.
Business Unit	Enter the business unit that is associated with the vendors to which you want to publish POs.

If you select the selection type *Select Ven,* define these settings:

Vendor Selection	Values are:
	1 Vendor: Select to publish POs to a specific vendor.
	All Vendor: Select to publish POs to all vendors associated with a specified setID.
Vendor Set ID	Select the setID that is associated with the vendors to which you want to publish POs.
Vendor ID	If you selected the Vendor selection type *1 Vendor,* select the vendor to which you want to publish POs.
Location	If you selected the vendor selection type *1 Vendor,* select the vendor location where you want to publish POs.

Dispatching POs to a Marketplace

Access the Process Marketplace Orders page (eProcurement, Buyer Center, Dispatch Purchase Orders, Marketplace).

Process Marketplace Orders page

Run the Process Marketplace Orders (PV_MS_PO_SEL) process to dispatch and publish purchase orders to a marketplace. This process only applies to purchase orders with a marketplace supplier.

See Also

Chapter 8, "Integrating with a Marketplace," page 155

Viewing PO Statuses and Messages

Access the PO Dispatch Message Log page (eProcurement, Buyer Center, Dispatch Purchase Orders, Dispatch Message Log).

PO Dispatch Message Log page

All POs appear for these dispatch methods:

* Dispatched to the marketplace.

* Electronically transmitted to the vendor by using the dispatch and publish processes.

| **Search** | Click the Search button to retrieve POs based on the criteria you entered in the upper half of the page. The Status column is updated with the results. If the marketplace has received the order, the PO Status column changes to *Dispatched.* |

This information appears for each PO the search locates:

| **Date** | Displays the PO date from the PO header. |

PO Status	Displays the current status of the PO within PeopleSoft eProcurement. This status is from the PO header in PeopleSoft eProcurement.
Status	Reflects the stage of the PO within the dispatch process. The status that appears could reflect the stage of the PO when electronically transmitted to the vendor or when dispatched to the marketplace.

When the PO is electronically transmitted to the vendor, the values include:

Error: PO has not been dispatched nor published.

Dispatched: PO has been dispatched.

Published: PO has been dispatched and published.

When the PO is dispatched to the marketplace, values include:

Received: PO has been sent by PeopleSoft eProcurement and received by the marketplace. The system has not yet received a response from the marketplace.

Accepted: The marketplace has received the PO, and the supplier has responded and accepted it. Comments attached to the PO header or line might also appear.

Completed: The PO has been sent to the marketplace, accepted by the supplier, the goods or services have been received, and the supplier has been paid.

No Accept: The marketplace has received the PO and the supplier has responded and rejected it. Comments that were attached by the supplier appear in the Message column.

Cancelled: Supplier has accepted the PO, but has canceled the order for a later time.

Pre-Pymt Required: Supplier has accepted the PO and has assigned this status to indicate that a prepayment is required to fulfill the order.

Other: Supplier has accepted the PO and later assigned this status to indicate that there is a problem with the order. The supplier's messages at the PO header or line level should detail this problem.

Completed: PO has been sent to the marketplace, accepted by the supplier, the goods or services have been received, and the supplier has been paid.

	Click the PO Lines Error Messages button to review comments from the marketplace supplier about a PO line. This button is only available for POs sent to the marketplace.
Message	For POs that are electronically transmitted to the vendor, this column displays a message indicating whether the system encountered errors when dispatching or publishing POs. For POs sent to the marketplace, this column displays messages entered by the marketplace supplier on the PO header.

Viewing Messages Entered on PO Lines

Access the PO Lines Dispatch Message Log page (Click the Dispatch Message Log link on the PO Dispatch Message Log page).

Line Number	Displays the line number of the PO. Only lines that contain supplier messages appear. The PO could contain additional lines that do not appear.
Message Text	Displays any message entered by the marketplace supplier on this PO line.

Formatting Purchase Orders With Oracle XML Publisher

The purchase order format determines the layout of the purchase order when it is printed, faxed, attached to an email, or electronically transmitted using EDX. To format the purchase order, you can choose between SQR and Oracle XML Publisher. If you choose Oracle XML Publisher, then the system uses the PeopleSoft Job POXMLP to dispatch the purchase orders.

XML Publisher is a template-based reporting solution that separates the data extraction process from the report layout and enables the reuse of extracted application data into multiple report layouts. You can change the format or layout of a purchase order report without changing the underlying program that controls the business logic. The format and layout includes the appearance of the report and addition or removal of fields on the report as long as those fields are available as part of the PO dispatch data. Change the purchase order formats by choosing different report template IDs for different types of purchase orders. The template ID for dispatched purchase order can be defined at the system-level, the business unit level, the run control for the dispatch process, or the individual purchase order. To use the XML Publisher for purchase orders in both PeopleSoft eProcurement and PeopleSoft Purchasing, select the Enable XML Publisher check box on the Purchasing page of the Installation Options component.

PeopleSoft is delivered with sample data already set up to generate an XML Publisher purchase order that uses the same format as the SQR report. Use this data as a starting point to create your own layout for purchase orders using the XML Publisher. This data in XML Publisher (Reporting Tools, XML Publisher) includes:

- Report Definition: PO_DISPATCH

- Data Source ID: PO_DISPATCH

- Template File: PO_DISPATCH.RTF

Default Hierarchy for the Template ID

When dispatching purchase orders, the system must identify the XML Publisher template ID. The template ID for a purchase order can be defined on the:

1. *Purchase Order:* Enter the template ID for an individual purchase order using the PO Header Details page or the Dispatch Options page. If the Template ID field is blank on the purchase order, then the system looks to the:

2. *Run Control Page for the Dispatch Process:* Enter the template ID for the individual process run of the dispatch process. This dispatch process is the PeopleSoft Job POXMLP and can be accessed from the Batch Dispatcher page in PeopleSoft eProcurement or the Dispatch Purchase Orders page in PeopleSoft Purchasing. If the Template ID field is blank on this run control page, then the system looks to the:

3. *Purchasing Business Unit:* Enter the template ID for all purchase orders dispatched within one business unit by entering the template ID on the Purchase Order Images page within the Purchasing Business Unit component (BUS_UNIT_PM). If the Template ID field is blank on the Purchase Order Images page, then the system uses the:

4. *Report Definition in XML Publisher:* Identify the default template ID on the Report Definition-Template page within the XML Publisher.

See Also

Enterprise PeopleTools 8.50 PeopleBook: XML Publisher for PeopleSoft Enterprise

Pages Used to Format Purchase Orders With Oracle XML Publisher

Page Name	Definition Name	Navigation	Usage
Installation Options-Purchasing	INSTALLATION_PO	Set Up Financials/Supply Chain, Install, Installation Options, Purchasing	Select the Enable XML Publisher check box to use XML Publisher to format your purchase orders in PeopleSoft eProcurement and PeopleSoft Purchasing.
Report Definition-Template	PSXPRPTTMPL	Reporting Tools, XML Publisher, Report Definition, Template	Associate one or more template IDs with a report definition, such as PO_DISPATCH. Select the Default Template check box to identify one template ID as the default to be used.
Purchase Order Images (Define Dispatch Options)	BUS_UNIT_PM_IMAGE	Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition. Click the Define Dispatch Options link.	Use the Template ID field to define a report template for this PeopleSoft Purchasing business unit. Oracle XML Publisher uses this report template for all purchase orders within the business unit unless overridden by another template ID on the individual purchase order or the dispatch process run control page.

Page Name	Definition Name	Navigation	Usage
Dispatch Purchase Orders	RUN_DISP_POPO005	eProcurement, Buyer Center, Dispatch Purchase Orders, Batch Dispatcher	In the Template ID field, select the report template that you want to use with this dispatch process (PeopleSoft Job POXMLP). This field applies to the individual process run and overrides the template ID selected at the business unit level or system-level.
PO Header Details	PO_HDR_DTL	eProcurement, Buyer Center, Manage Purchase Orders. Select the purchase order on the Manage Purchase Orders page. Click the Header Details link on the Maintain Purchase Order - Purchase Order page.	Use the Template ID field to define an XML Publisher report template for this purchase order.
Dispatch Options	DISPATCH_OPTIONS	eProcurement, Buyer Center, Manage Purchase Orders. Select the purchase order on the Manage Purchase Orders page. Click the Dispatch button on the Maintain Purchase Order - Purchase Order page.	Use the Template ID field to define an XML Publisher report template for this purchase order.

Setting Up Dynamic Dispatching

To set up dynamic dispatching, use the EDX Dispatch Types component (PV_EDX_TYPE).

This section provides an overview of dynamic dispatching and discusses how to:

• Define dynamic dispatch EDX dispatch types.

• Link dynamic dispatch types to suppliers.

• Dispatch dynamic dispatch POs.

Understanding Dynamic Dispatching

Dynamic dispatching is a dispatch method that runs as a background process. You use the same pages to define this type of dispatching as you do with other dispatch types. The advantage of dynamic dispatching; however, is that it leverages a common set of logic to dispatch purchase orders. This enables you to quickly adjust to meet different online XML standards that might be implemented by a supplier or a website.

You can dispatch a PO as an XML document in a defined format. If the structure of that format is not compatible with the structure of the XML document required to integrate with a third-party supplier, then PeopleSoft Integration Broker can convert the structure using PeopleSoft Application Engine transformation programs. Using different connectors and a framework for transforming an XML message to another XML message, the Integration Broker makes it possible to develop a uniform and consistent interface for integration.

The PeopleSoft integration to the Oracle Supplier Network uses dynamic dispatching. The Oracle Supplier Network uses the Open Application Group (OAG) format for XML documents. For outbound transactions from the PeopleSoft eProcurement or Purchasing applications, the PeopleSoft Integration Broker uses application engine transformation programs to convert XML messages that use the PeopleSoft format (PSXML) into OAG XML files. For inbound transactions from the Oracle Supplier Network, OAG XML messages are sent to the PeopleSoft Integration Broker where transformation programs convert the incoming files into the PSXML format.

When a supplier changes to a different XML standard, then using the Integration Broker, you can react with a format to meet that standard. To adjust for the change, dynamic dispatching uses the Integration Broker's transformation capabilities to send xCBL, cXML, OAG, or EDX files. The Integration Broker uses a common set of logic to identify POs eligible for dispatching.

See Also

Pages Used to Set Up Dynamic Dispatching

Page Name	Definition Name	Navigation	Usage
EDX PO Dispatch Types	PV_EDX_TYPE	eProcurement, Administer Procurement, Maintain Supplier Integration, EDX PO Dispatch Types	Define dynamic dispatch types for EDX.
Linked Suppliers	PV_MS_SEC_SUPPLIER	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers	Link dynamic dispatch types to suppliers. See Chapter 3, "Determining Technical Implementation Options," Using the Linked Suppliers page, page 46.
Buyer Setup	PV_MS_SEC_BUYER	eProcurement, Administer Procurement, Maintain Supplier Integration, Marketplace Buyers	Set up marketplace buyers for dynamic dispatch. See Chapter 8, "Integrating with a Marketplace," Setting Up Marketplace Suppliers and Buyers, page 160.

Defining Dynamic Dispatch EDX Dispatch Types

Access the EDX PO Dispatch Types page (eProcurement, Administer Procurement, Maintain Supplier Integration, EDX PO Dispatch Types).

EDX PO Dispatch Types page

Use this page to define EDX dispatch types for use with dynamic dispatching.

EDX PO Dispatch Type   Define the dispatch type. The system is delivered with the following types:

- *CXML12:* For integration with a vendor using the cXML format.

- *OAG72:* For integration with the Oracle Supplier Network (OAG format).

- *XCBL30:* For integration with a marketplace (xCBL format).

Root Package ID   Enter the PeopleSoft application package. The system is delivered with the application package SCM_PV_PO_DISPATCH.

Application Class Path   Enter the PeopleSoft application class to be used within the application package. The following application classes are delivered within the application package SCM_PV_PO_DISPATCH:

- *CxmlPurchaseOrder:* For integration with a vendor using the cXML format.

- *OAGPurchaseOrder:* For integration with the Oracle Supplier Network (OAG format).

- *XcblPurchaseOrder:* For integration with a marketplace (xCBL format).

Setting Up and Sending POs to Vendors by EDX

This section discusses how to:

- Activate the purchase order dispatch service operation.

- Define batch publish rules.

- Specify source data for records.

- Associate publish processes with rules.

- Send PO service operations.

By using the EDX method, you can transmit dispatched POs to vendors that are neither marketplace vendors nor direct connect suppliers by converting POs into service operation messages and sending them to vendors.

Pages Used to Set Up and Send POs to Vendors By EDX

Page Name	Definition Name	Navigation	Usage
Batch Publish Rules	EO_MSGPUBATCH	Enterprise Components, Integration Definitions, Batch Publish Rules	Define batch publishing rules that determine how the dynamic dispatch transactions should be sent electronically.
Record Mapping	EO_MSGRECMAP	Enterprise Components, Integration Definitions, Batch Publish Rules, Record Mapping	Specify source data for records (such as POs) in messages.
Batch Programs	EO_MSGBATPGM	Enterprise Components, Integration Definitions, Batch Publish Rules, Batch Programs	Associate publish processes with rules.
Add Nodes to Chunk Rule	EO_ADNODECHUNK_PNL	Enterprise Components, Integration Definitions, Map Chunking Rules, Node to Chunk Rule	Map nodes to chunk rules. See *PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook*, "Implementing Integrations," Setting Up Chunking.

Activating the Purchase Order Dispatch Service Operation

PeopleSoft delivers a purchase order dispatch service operation, which enables eProcurement to send POs to vendors by EDX. The PURCHASE_ORDER_DISPATCH is an outbound asynchronous service operation.

PeopleSoft delivers the service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source or another PeopleSoft system, such as CRM.

To set up this service operation, use the information in this table and refer to the setup instruction in the PeopleSoft Supply Chain Management Integrations 9.1 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

Service Operation	Direction and Type	Handlers	Chunking Available ?	Integrates With
PURCHASE_ORDER_DISPATCH	Outbound Asynchronous	ROUTERSENDHDLR	Yes	third-party system

Defining Batch Publishing Rules

Access the Batch Publish Rules page (Enterprise Components, Integration Definitions, Batch Publish Rules).

Batch Publish Rules page

Use this page to associate a rule to a message and characterize the rule.

Batch publish rules describe jobs or processes that run independently from their initiating process. A batch process can also run at one or more predetermined times in the future from the initiating request. This is appropriate for publishing incremental changes to data in a batch environment or when processing large volumes.

Specify Source Data for Records

Access the Record Mapping page (Enterprise Components, Integration Definitions, Batch Publish Rules, Record Mapping).

Record Mapping page

Use this page to map the Message Record Name to the Source/Order by Record Name.

Associating Publish Processes with Rules

Access the Batch Programs page (Enterprise Components, Integration Definitions, Batch Publish Rules, Batch Programs).

Batch Programs page

Use this page to assign an application program (PROCESS_NAME) to the publish rule.

Sending PO Service Operations

To send purchase order service operations:

1. Dispatch POs.

   Use the Online Dispatcher page or the Batch Dispatcher page to dispatch POs and load them into interface tables.

2. Convert POs into XML service operations.

   Use the Publisher page to initiate the Publisher process. The Publisher process converts the POs in the interface tables into XML service operations and publishes those service operations to the vendors.

See Also

Chapter 14, "Dispatching Purchase Orders in PeopleSoft eProcurement," Dispatching Purchase Orders, page 373

Accessing the Service Operations Monitor and Process Monitor Components

You monitor system service operation queues through the Service Operations Monitor. It provides information about the delivery status of individual service operations and aids in error processing and resolution. The Service Operations Monitor is generally used by system administrators.

After you submit a job using the Process Scheduler Request page, use the Process Monitor to review the status of scheduled or running processes. You can view all processes to see the status of any job in the queue and control processes that you initiated. The Process Monitor consists of two pages: the Process List page and the Server List page.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"

Pages Used to Access the Service Operations Monitor and Process Monitor Components

Page Name	Definition Name	Navigation	Usage
Monitor Overview	IB_MONITOR_OVRVIEW	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor • PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services	Access high-level service operation information so that you can isolate areas for detailed information. This includes the status of asynchronous service operation messages, publication contracts, and subscription contracts. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*

Page Name	Definition Name	Navigation	Usage
Operation Instances	IB_MONITOR_PUBHDR	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor Click the Operation Instances tab. • PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services Click the Operation Instances tab.	Monitor operation instances. This includes information related to the individual asynchronous service operation instances that exist in a live or an archived system. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*
Publication Contracts	IB_MONITOR_PUBCON	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor Click the Publication Contracts tab. • PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services Click the Publication Contracts tab.	View publishing contracts. These are outbound service operations that you are sending to remote message nodes with which the system is interacting. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*
Subscription Contracts	IB_MONITOR_SUBCON	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor Click the Subscription Contracts tab. • PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services Click the Subscription Contracts tab.	View subscription contracts. These are service operations to run PeopleCode programs to which the local node receives. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*

Page Name	Definition Name	Navigation	Usage
Synchronous Services	AMM_SYNCMSGLIST	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor, Synchronous Messages • PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Synchronous Services	View synchronous service operations. These are inbound service operations from remote nodes or applications that send information.
Domain Status	AMM_MULTIDOM	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor, Domain Status • PeopleTools, Integration Broker, Service Operations Monitor, Administration, Domain Status	Use this page to view the domains that have publishing and subscription servers on them that are running against the application database. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*
Node Status	AMM_NODE_STATUS	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor, Node Status • PeopleTools, Integration Broker, Service Operations Monitor, Administration, Node Status	Use this page to maintain pause times. A pause time is an interval of time during which the de becomes inactive. When the pause time begins, the node is shut down until the pause time is scheduled to end. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*
Queue Status	IB_MONITOR_QUEUES	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor, • PeopleTools, Integration Broker, Service Operations Monitor, Administration, Queue Status	Use this page to view, pause, and start service operation queues. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*

Page Name	Definition Name	Navigation	Usage
Statistics	AMM_STATISTICS	• eProcurement, Buyer Center, Dispatch Purchase Orders, Publish Monitor, Statistics • PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Statistics	View messaging runtime performance data. See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker, "Using the Service Operations Monitor"*
Process List	PMN_PRCSLIST	• eProcurement, Buyer Center, Dispatch Purchase Orders, Process Monitor, Process List • PeopleTools, Process Scheduler, Process Monitor	Use this page to monitor the process requests that you submit. This page enables the user to see if a process encounters an error, or if a server is not operating. the user can also see the processes that are queued to run at a future time. See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler, "Using Process Monitor"*
Server List	PMN_SRVRLIST	• eProcurement, Buyer Center, Dispatch Purchase Orders, Process Monitor Click the Server List tab. • PeopleTools, Process Scheduler, Process Monitor Click the Server List tab.	Use this page to view information about each of the Process Scheduler server agents that are defined in the system. See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler, "Using Process Monitor*

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker, "Using the Service Operations Monitor"

Chapter 15

Using the Approval Framework in PeopleSoft eProcurement

This chapter provides an overview of the approval framework and discusses how to:

* Set up approval framework in PeopleSoft eProcurement.

* Perform approval tasks for requisitions.

Understanding the Approval Framework

Many daily tasks are part of a larger process that involves several steps and people working together. The term *workflow* refers to this process, which could encompass, for example, the approval of a requisition. To facilitate this type of multiuser process, the PeopleSoft product can automatically trigger workflow notifications to inform the next approver in the process of work awaiting him or her. When the process is complete, the transaction is promoted to its next stage. In the case of a requisition, the next stage is that it is sourced as a purchase order. PeopleSoft applications offer two types of workflow:

1. PeopleTools Workflow Technology, documented in the *Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology.* This method requires you to use PeopleSoft Application Designer, PeopleCode, and Workflow Administrator.

2. PeopleSoft Approval Framework, documented in the *PeopleSoft Enterprise Approval Framework PeopleBook.* The standard PeopleSoft workflow requires advanced technical skills in PeopleSoft PeopleTools to create and maintain workflow; in contrast, the Approval Framework provides an alternative workflow that is much easier to create and maintain. For example, all of the steps in Approval Framework are defined by means of PeopleSoft pages rather than the underlying PeopleSoft PeopleCode, so functional users can design and maintain workflow using these online PeopleSoft pages without technical developers having to create workflow rules.

Within PeopleSoft eProcurement, the approval of requisitions is handled by the Approval Framework. Most of the work has already been done for you and is delivered with your PeopleSoft system. You need to activate the workflow and adjust the approval setup to identify your individual users, templates, and servers. This chapter discusses the setup of requisition approval within PeopleSoft eProcurement. Requisitions that have been changed and require reapproval are approved in the same component as the original requisitions.

After a requisition is created, the system routes the transaction to an approver. The approver can view and take action in two ways: using his or her worklist or navigating directly to the Manage Requisition Approvals page. The approver can preview, in a graphical format, the path that the requisition approval will take, view who has already approved the requisition, and see any comments that previous approvers have entered.

While the system awaits approval action, the approval framework maintains the overall state of the requisition, invokes routings, and interacts with the application classes.

During the approval process these actions take place:

- The system notifies approvers and reviewers that a pending requisition needs their attention.

- Approvers and reviewers access the requisition details, provide comments, and take action (approve, deny, or push back) for the requisition.

- The system checks for additional routings in the same routing path.

  If all steps have been completed for the stage, then the next step is started in the next stage. If multiple routing paths exist, the system routes them in parallel.

- Once all approvers of a requisition have approved it, the Approval Framework notifies the PeopleSoft eProcurement application. The requisition is then ready for the next step.

See Also

PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining Users for Approval Workflow"

Setting Up Approval Framework in PeopleSoft eProcurement

This section discusses how to:

- Set up the Approval Framework in PeopleSoft eProcurement.

- Use the Maintain Approval Workflow page.

- Set up email approvals for PeopleSoft eProcurement.

- Determine the maximum requisition lines to display.

Complete information about the setup and use of the Approval Framework is located in the *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook*.

Use the following steps to set up the requisition approval process within PeopleSoft eProcurement:

Set Up the User Profile Component

For users with PeopleSoft eProcurement:

- Use the User Profile-Workflow page to identify the supervisor who should approve the user's new requisitions or purchase orders.

- Use the User Profile-Roles page to enter the roles of the user. A role is a class of users who perform the same type of work, such as an eProcurement requestor, buyer, or manager. A role describes how people fit into workflow. Roles are defined under PeopleTools, Security, Permissions & Roles, Roles.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining Users for Approval Framework"*

Define User Lists

Use the User List Definition page to define lists of users who can approve transactions. Your list of approvers can be defined as a particular user role, SQL definition, PeopleSoft Query, or Application Class. These lists are used with steps in the approval process. The PeopleSoft product delivers a set of default SQL definitions and default user list roles.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining User Lists"*

Grant eProcurement Role Actions to the Appropriate User Roles

PeopleSoft eProcurement comes with several predefined role actions that restrict or grant user access to certain actions. Use the eProcurement Role Actions page to assign role actions to specific user roles. The following role actions can enable approval features for requisitions:

- *ALLOWHOLD:* Displays the Hold button on requisition approval pages.

- *ALLOW_ADHOC_ONSUBMIT :* Allows for adding or removing ad hoc approvers after you submit the requisition.

- *ALLOW_ADHOC_ONPREVW :* Enables users to add or remove ad hoc approvers on requisition preview.

- *CANCHANGEALL:* Enables a requester to change any field on the requisition without restarting the approval process while the requisition is in a pending approved status.

- *CANCHANGEDISTRIB:* Enables the requester to change any field on the requisition distribution without restarting the approval process while the requisition is in a pending approved status.

- *CANCHANGEHEADER:* Enables the requester to change any field on the requisition header without restarting the approval process while the requisition is in a pending approved status.

- *CANCHANGELINE:* Enables the requester to change any field on the requisition line, with the exception of quantity and price, without restarting the approval process while the requisition is in a pending approved status.

- *CANCHANGESCHEDULE:* Enables the requester to change any field on the requisition schedule without restarting the approval process while the requisition is in a pending approved status.

- *MASS_APPROVER:* Enables a requester to approve multiple requisitions at one time. The Approve Requisitions component is where the actions are enabled.

- *WF_EXPAND_APPROVER:* Enables users to always see the Review/Edit Approvers section in the eProcurement Approval page when it is expanded.

See <u>Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39.</u>

Create Change Templates

Define change templates for requisitions to identify when a change to a requisition field should initiate the reapproval of the requisition by the Approval Framework. To create a change template for requisitions, use the change template type of Requisition. When you first create the change template, the system supplies the default approval workflow trigger for the following fields in both the REQ_LINE and REQ_LINE_SHIP records:

1. MERCHANDISE_AMT

2. PRICE_REQ

3. QTY_REQ

Once you have created the change template for requisitions, attach the template to the Purchasing business unit using the Purchasing Definition-Req Change Options page. The change template entered in this page is shared by the same business unit across the PeopleSoft Purchasing, eProcurement, and Services Procurement applications. If no requisition change template is defined for the business unit, then any field changes start the re-approval of the requisition line using the approval framework feature.

See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Creating Change Templates.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Establishing Change Options and Approval Rules.

Review the Approval Transaction Registry

The Approval Transaction Registry is the interface application used to register an application with the approval framework. You use the Register Transactions page to link the components, event handler, records, and classes that you created to the approval process for an application transaction, such as a requisition. The main records and components that make up the transaction are registered, along with the approval transaction on which to base the approval process definition.

Any PeopleSoft-delivered approvals already have the Approval Transaction Registry populated. No additional configuration is typically needed. This includes the transaction registry for requisition approval (process ID Requisition).

The transaction registry with the process ID of Requisition uses the cross-reference table PV_REQ_AW and the default approval component of PV_REQ_APPROVAL. Note that a changed requisition uses the same workflow setup as the original requisition; it is a reapproval of the requisition. PeopleSoft Purchasing and PeopleSoft eProcurement share the same setup data, even though the objects begin with PV.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining the Approval Transaction Registry"*

Configure the Approval Transactions

Use the Configure Transactions page to select and define elements that determine what triggers a notification, who receives the notification, and the content of the notification. Notifications are mapped to work with the approval transaction registry and include menus and components and SQL definitions.

For the process ID of Requisition, use the approval component of PV_REQ_APPROVAL.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Configuring Approval Transactions"*

Set Up Process Definitions

Use the Setup Process Definition component to define an approval definition process. This definition is made up of the stages, paths, steps, and criteria that build a workflow.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining the Setup Process Definition Component"*

Authorize Approvers and Roles for Dynamic Approval

PeopleSoft applications use workflow to configure approval paths in two manners. The first configuration is to define every approval in step-by-step fashion. The second manner is to create dynamic approvals. Use the Approval Authorization component to authorize roles and approvers for dynamic paths.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining Dynamic Approvals"*

Set Up the Approval User Monitor

The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals. Each process ID can be configured using the Approval Monitor Configuration page (eProcurement, Administer Procurement, Maintain Workflow, Monitor Configuration).

Once configured, the Monitor Approvals page can be accessed from eProcurement, Administer Procurement, Maintain Workflow, Monitor Approvals.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Using the Approval Monitor"*

See

Define Ad Hoc Notification Templates

Use the Generic Template Definition page to establish a common format for all ad hoc notifications. This provides functionality that is similar to the Approval Monitor but not limited to the administrators.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining Notification Templates for Approval Framework"*

Set Up Email Approvals for PeopleSoft eProcurement

The email collaboration feature enables applications to send, receive, and process emails with interactive content. You can use it to send email approvals for requisitions. You can send an HTML form to a user, and that user does not need to log in to his or her system to perform tasks.

Set Up the Notification and Escalation Manager

The Notification and Escalation Manager (NEM) is a mechanism used to process notifications and escalations on a specified interval. For example, escalations are used when an approver has not responded within a specified time period to a transaction that is pending approval. You can specify the time period (timeout) and you can specify alternate approvers to notify and to whom to escalate the approval for further action. Timeout options are defined on the Approval Path Definition page.

To set up the NEM, use the following pages: Event Types, Setup Event, Event Status, and Schedule JobSet Definitions.

See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Using the Notification and Escalation Manager"*

Register Worklists with the Activity Monitor

Use the Register Worklist for Activity Monitor page to register the business process name, activity name, and work list name with the activity monitor.

Determine the Maximum Rows for the Approval Monitor and Other Pages

On the eProcurement Installation Options page, enter the maximum number of requisition lines to be displayed at one time in the Review/Edit Approvers section of the workflow approval components. You can access additional lines by using the chunking options at the top of the section, including using the Next Item button or Last Item button, or entering a range of requisition lines and clicking the Retrieve button. The default for this field is *5*.

Activate Workflow

Activate the approval framework for requisitions by using the:

• Purchasing Definition-Req Change Options page. Use the Purchasing business unit to enable the Approval Framework for requisitions in both PeopleSoft Purchasing and PeopleSoft eProcurement. Select the Workflow Approval Required check box to enable requisition approval within the business unit. Select this check box to replace the PeopleTools workflow technology (virtual approver) in PeopleSoft Purchasing with the Approval Framework. If you enable the Approval Framework for the Purchasing business unit, then it is enabled for eProcurement also. The Change Template entered on this page is used by PeopleSoft Purchasing, eProcurement, and Services Procurement to determine which field changes to the original requisition will launch the approval framework for requisition reapproval.. Select the Resubmit Workflow for Quantity and Price Decrease check box to require approval of a requisition change with a decrease in item quantity or price.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Establishing Change Options and Approval Rules.

- eProcurement Business Unit Options page. Select the Workflow Approval Required check box to enable requisition approval within the eProcurement business unit. Select the Resubmit Workflow for Quantity and Price Decrease check box to require reapproval of a requisition with a decrease in item quantity or price. If the Workflow Approval Required check box is selected on the PeopleSoft Purchasing business unit, then the Approval Framework is enabled for both Purchasing and eProcurement and this check box on this page is unavailable. Selecting the Workflow Approval Required check box on the eProcurement business unit but not the Purchasing business unit enables the Approval Framework only in PeopleSoft eProcurement; in this case, if you edit an eProcurement requisition within a Purchasing component, then the virtual approver is used instead of the approval framework. Note that a requisition added in PeopleSoft eProcurement (that is, having a SYSTEM_SOURCE of EPO) can be changed by means of the PeopleSoft Purchasing components only if you have selected the Allow Req Change in Purchasing check box on this page (eProcurement Business Unit Options page). When approval framework is used in PeopleSoft Purchasing, a requisition added in PeopleSoft Purchasing cannot be altered by means of the PeopleSoft eProcurement components.

Pages Used to Set Up Approval Framework in PeopleSoft eProcurement

Page Name	Definition Name	Navigation	Usage
Maintain Workflow	PV_ADM_WORKFLOW	eProcurement, Administer Procurement, Maintain Workflow	Access many of the pages and components that you use to set up the Approval Framework for PeopleSoft eProcurement. Access to this page is limited to users with the SYSTEM_ADMIN action role.
User Profiles - Roles	USER_ROLES	• PeopleTools, Security, User Profiles, User Profiles Select the Roles tab. • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Workflow Roles.	Attach workflow roles to users. See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining Users for Approval Workflow"*

Page Name	*Definition Name*	*Navigation*	*Usage*
User Profiles - Workflow	USER_WORKFLOW	• PeopleTools, Security, User Profiles, User Profiles Select the Workflow tab. • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, Set Supervisors.	Define supervisors. See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining Users for Approval Workflow"*
User List Definition	PTAF_USER_LIST	• Enterprise Components, Approvals, Approvals, User List Setup • For PeopleSoft eProcurement, use eProcurement, Administer Procurement, Maintain Workflow, User List Definition.	Define user-list definitions. See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining User Lists"*
eProcurement Role Actions	PV_ACTIONS	eProcurement, Administer Procurement, Maintain System Users and Roles, eProcurement Role Action	Assign actions to user roles. See Chapter 3, "Determining Technical Implementation Options," Maintaining System Users and Roles, page 37.
User Preferences: Procurement - Requisition Authorizations	OPR_REQ_AUTH	Set Up Financials/Supply Chain, Common Definitions, User Preferences, Define User Preferences, Procurement Click the Requisition Authorizations link on the Procurement page.	Authorize users to initiate and update requisitions for applicable requesters. Define a user's requisition processing authority in relation to applicable requesters.

Page Name	Definition Name	Navigation	Usage
Change Template	CHNG_ORD_TEMPLATE	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Change Template	Identify the fields on a requisition, purchase order, or contract that can initiate the following actions when the field is changed. For a requisition, identify the field changes that create change tracked records, reapproved by the Approval Framework, and creation of a change request. For a purchase order, identify the field changes that create change tracked records and re-approved by the Approval Framework.
eProcurement Business Unit Options	PV_BUS_UNIT_PM	eProcurement, Administer Procurement, Maintain Business Units, eProcurement Business Unit Options	Define business unit options for PeopleSoft eProcurement.
Purchasing Definition-Req Change Options	BUS_UNIT_REQ_APPR	Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition, Req Change Options	Define requisition approval requirements for each business unit.
Register Transactions	EOAW_TXN	• eProcurement, Administer Procurement, Maintain Workflow, Register Transactions • Enterprise Components, Approvals, Approvals, Transaction Registry	Register an application with the approval framework.
Configure Transactions	EOAW_TXN_NOTIFY	• eProcurement, Administer Procurement, Maintain Workflow, Configure Transactions • Enterprise Components, Approvals, Approvals, Transaction Configuration	Use the Configuration Transactions page to configure how the system uses the particular implementation of approval triggers.
Service Operations-General	IB_SERVICE	PeopleTools, Integration Broker, Integration Setup, Service Operations	Click the Active check box for the PV_EMAIL_REQ_APPROVAL service operation.

Page Name	Definition Name	Navigation	Usage
Setup Process Definitions	EOAW_PRCS_MAIN	• eProcurement, Administer Procurement, Maintain Workflow, Setup Process Definitions • Enterprise Components, Approvals, Approvals, Approval Process Setup	Define workflow approval process stages.
Approval Authorization	EOAW_AUTH	• eProcurement, Administer Procurement, Maintain Workflow, Approval Authorization • Enterprise Components, Approvals, Approvals, Authorize Approvers	Authorize roles and approvers for dynamic paths.
Approval Monitor Configuration	EOAW_MONDIS_CONFIG	• eProcurement, Administer Procurement, Maintain Workflow, Monitor Configuration • Enterprise Components, Approvals, Approvals, Monitor Configuration	Configure the approval monitor.
Monitor Approvals	EOAW_ADM_MON_SRC	• eProcurement, Administer Procurement, Maintain Workflow, Monitor Approvals • Enterprise Components, Approvals, Approvals, Monitor Approvals	View all approvals to which you have access, as well as take necessary actions on pending approvals.
Generic Template Definition	WL_TEMPLATE_GEN	PeopleTools, Workflow, Notifications, Generic Templates	Use the Generic Template Definition page to establish a common format for all ad hoc notifications.
Event Types	EOAW_NEM_EVENTS	• eProcurement, Administer Procurement, Maintain Workflow, Event Types • Enterprise Components, Approvals, Notification and Escalations , Events	Associate events to a server.

Page Name	Definition Name	Navigation	Usage
Setup Event	EOAW_NEM_SETUP	• eProcurement, Administer Procurement, Maintain Workflow, Event Definition • Enterprise Components, Approvals, Notification and Escalations , Notifications and Escalations	Set up an escalation event and define the evaluation and action details.
Event Status	EOAW_NEM_STATUS	• eProcurement, Administer Procurement, Maintain Workflow, Event Status • Enterprise Components, Approvals, Notification and Escalations, Status	Check status of notification.
Schedule JobSet Definitions	SCHDLDEFN	• eProcurement, Administer Procurement, Maintain Workflow, Schedule Notification Job • PeopleTools, Process Scheduler, Schedule JobSet Definitions	Set up a NEM to define the job to run and how often to run it.
Register Worklist for Activity Monitor	PV_WL_REGISTRY	eProcurement, Administer Procurement, Maintain Workflow, Activity Monitor Registry	Register the business process name, activity name, and work list name with the activity monitor.
eProcurement Installation Options	PV_INSTALLATION_PV	eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options	Set up PeopleSoft eProcurement installation options including the maximum number of requisition lines to be displayed at one time in the Review/Edit Approvers section of the workflow approval components. Access to this page is limited to users with the SYSTEM_ADMIN action role.

Using the Maintain Approval Workflow Page

Access the Maintain Workflow page (eProcurement, Administer Procurement, Maintain Workflow).

Maintain Workflow page

Use the Maintain Workflow page to gain easy access to many of the pages needed to set up the requisition approval process within PeopleSoft eProcurement. For more information about these pages, see the beginning of this section.

See Also

PeopleSoft Enterprise Approval Framework 9.1 PeopleBook

Setting Up Email Approvals for PeopleSoft eProcurement

The email collaboration feature enables applications to send, receive, and process emails with interactive content. You can use it to send email approvals for requisitions. You can send an HTML form to a user, and that user does not need to log in to his or her system to perform tasks.

These steps describe the flow of email collaboration:

1. A system event triggers PeopleSoft PeopleCode, which creates a collaborative email and sends it to a user.

2. The user who receives the email takes appropriate action and clicks Submit.

3. The user's submission is sent to an email account that is designated for holding responses.

4. An application engine program runs on a configured interval, polling the repository for new emails. It processes the emails and publishes them as service operation messages.

5. The service operation runs, enabling the implementing application to process the data in a known and supported format.

To set up email approvals:

1. On the Register Transactions page, complete the Notification Options section to include email notifications. Be sure to select the Use Email Approvals check box. Update the Register Transactions page for the process ID of *Requisition.*

   See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Defining the Approval Transaction Registry"*

2. On the Configure Transactions page, complete the Notification Options section. Select the Sent Email Approvals to All check box or add a user list in the Email Approval User List field. Update the Configure Transactions page for the process ID of *Requisition.*

   See *PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Configuring Approval Transactions"*

3. Design the format of the email to be sent using the Form Element Designer page, Form Layout Designer page, and Field Mapping page within the Email Collaboration menu (Enterprise Components, Approvals, Email Collaboration). For directions, see the Using Email Collaboration chapter of the *Enterprise Components: PeopleSoft Approval Workflow Engine 9.1 PeopleBook.*

4. Use the Node Properties page to modify the PSFT_EMC_GETMAIL node to enable email collaboration. For directions, see the Using Email Collaboration chapter of the *Enterprise Components: PeopleSoft Approval Workflow Engine 9.1 PeopleBook.*

5. Set up the Requisition Approval (PV_EMAIL_REQ_APPROVAL) service operation within PeopleSoft Integration Broker and Enterprise Components. For directions in activating a service operation, see the Implementing Integrations chapter of the *PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook.*

6. Schedule the PeopleSoft Application Engine program EOAWEMC to run on a regular basis. For directions, see the Using Email Collaboration chapter of the *Enterprise Components: PeopleSoft Approval Workflow Engine 9.1 PeopleBook.*

PeopleSoft delivers service operations in PeopleSoft Integration Broker with a default status of *Inactive.* You must activate each service operation before attempting to send or receive data from a third-party source. Use the information in this table and refer to the setup instructions in the PeopleSoft Supply Chain Management Integrations 9.1 PeopleBook, "Implementing Integrations" chapter, Setting Up Service Operations section.

Service Operation	*Direction and Type*	*Handlers*	*Chunking Available?*	*Integrates With*
PV_EMAIL_REQ_APPROVAL	Inbound Asynchronous	EmailSubscription	No	External XML

See Also

PeopleSoft Enterprise Approval Framework 9.1 PeopleBook, "Using Email Collaboration"

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

PeopleSoft Enterprise Supply Chain Management Integration 9.1 PeopleBook, "Implementing Integrations," Setting Up Service Operations

Determining the Maximum Requisition Lines to Display

Access the eProcurement Installation Options page (eProcurement, Administer Procurement, Maintain Overall System Options, eProcurement Installation Options).

eProcurement Installation Options page

On the eProcurement Installation Options page, use the following fields to set up the approval framework:

Max Rows Approval Monitor	Enter the maximum number of requisition lines to be displayed at one time (chunking) in the Review/Edit Approvers section of the workflow approval components and in the Confirmation page of the Create Requisition component. The default for this field is *5*.
Display Approval Chunking	Select this check box to enable chunking on the Review/Edit Approvers section of the workflow approval components and on the Confirmation page of the Create Requisition component. Chunking displays the requisition lines in groups to make large requisition more manageable.

On the Requisition Approval page (eProcurement, Approve Requisition. Click the Requisition ID link), you can access additional lines by using the chunking options at the top of the Review/Edit Approvers section. You can:

• Enter a range of requisition lines and click the Retrieve button.

• Use the First Item, Previous Item, Next Item, or Last Item button.
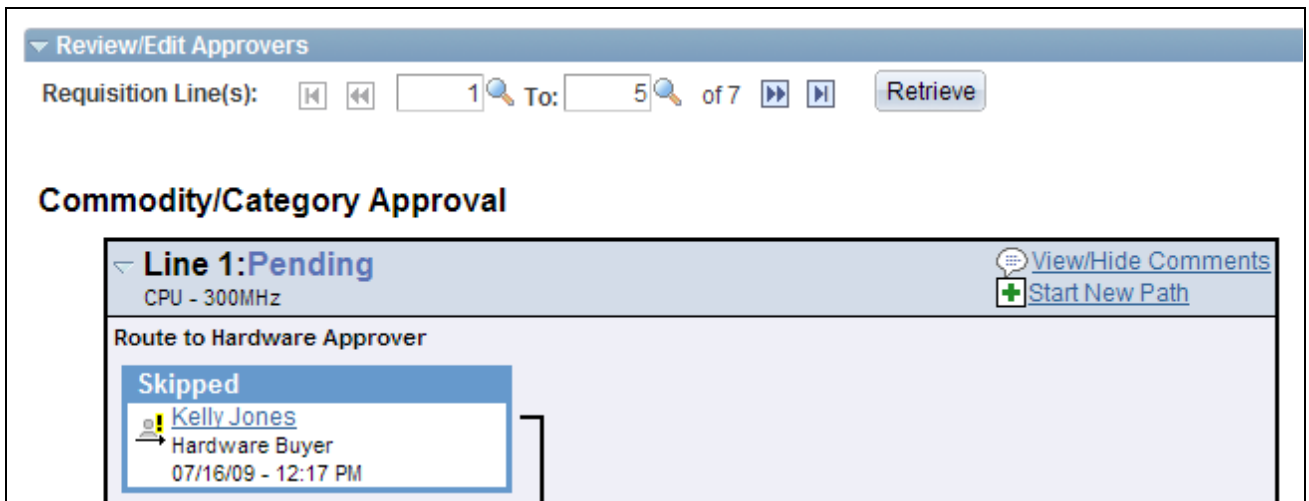
The Review/Edit Approvers section of the Requisition Approval page (partial page)

See Chapter 3, "Determining Technical Implementation Options," Setting Up Installation Options, page 22.

Performing Approval Tasks for Requisitions

This section discusses how to:

- Search for requisitions requiring approval.

- Perform eProcurement requisition line approval tasks.

- View details about requisition line items.

Understanding Approval Tasks for Requisitions

Use the Approve Requisitions component to perform a number of approval tasks, including:

- Approving a requisition or requisition line. You can approve the entire requisition at the header level or approve individual lines at the line level.

- Performing mass approvals. Using the Manage Requisition Approvals page, you can select multiple requisitions to be approved or denied at one time. Use the Mark All icons to perform mass approval. The Mark All icons do not appear unless the user has the eProcurement role action of *MASS_APPROVER* attached to his user role.

- Denying a requisition or requisition line. You can deny some lines of the requisition and approve others, making line-level approvals independent for each line. Once a requisition or requisition line is denied, the workflow stops.

- Holding a requisition or requisition line. This action gives the approver time to research an issue and prevents the approval process from going to the next approval step until the approver takes action on the requisition or requisition line. When an approver uses the hold action, the system inserts the requisition's originator (i.e. requester) as an ad hoc reviewer at the current approval step and the approver can add a comment requesting more information from the requester. If multiple approvers are required to approve in this one approval step in the approval framework, then the other approvers of the same step can approve or deny the requisition or requisition line; however, the approval process does not move to the next approval step until the hold is removed by the approver who entered it. The hold option does not display unless the user has the eProcurement role action of *ALLOWHOLD* attached to his user role.

- Pushing back a requisition or requisition line. A pushback returns the transaction to the previous approval step. The meaning of *push back* is that the approver is questioning the prior step's approval and is requesting clarification.

- Adding or removing ad hoc approvers or reviewers. During the approval process, approvers can add other approvers or reviewers to the current or a later stage of the approval process. For example, if a buyer wants input from an inventory analyst, she can add the analyst as an approver. This action is called ad hoc approval, and it applies only to the approval instance in which the addition occurs and does not affect the underlying process definition used for other requests.

- Reviewing an online requisition that shows the layout of the printed version. The requisition opens up as a second window and can be printed. The Oracle XML Publisher is used to generate this report, and you can customize it.

- Making comments to be viewed by other approvers or reviewers.

- Approving a requisition that has been changed. When a requisition is changed during or after the approval process, the Approval Framework can require re-approval of the changes using the same approval component as the original requisition.

Approving, Denying, or Holding a Requisition

A requisition can be approved, denied, or put on hold at the header or line level. The Manage Requisition Approvals component enables you to:

- Approve, deny, or hold multiple requisitions at one time using the mass approval feature on the Manage Requisition Approvals page.

- Approve, deny, or hold requisitions at the header level using the Manage Requisition Approvals page.

- Approve, deny, or hold requisition lines using the Manage Requisition Approvals page.

- Approve, deny, or hold requisition lines using the Requisition Approval page where you can view more details and add ad hoc approver and reviewers.

To approve, deny, or hold multiple requisitions using the mass approval feature:

1. Go to the Manage Requisition Approvals page.

2. Select the Approve, Deny, or Hold button on the Mark All row. All displayed requisitions are marked with this action in the Action/Status field.

3. Change the Action/Status field for any requisitions that you do not want included in the mass approval action.

4. Click the Submit button.

Manage Requisition Approvals page (partial page)

To approve, deny, or hold requisitions (header level) using the Manage Requisition Approvals page:

1. Select a requisition that is in pending status.

2. Select the *Approve, Deny,* or *Hold* option in the Action/Status field.

3. Click the Submit button at the bottom of the page.

Approving an entire requisition using the Manage Requisition Approvals page (partial page)

To approve, deny, or hold one or more requisition lines from the Manage Requisition Approvals page:

1. Expand a requisition in the Requisitions group box so that the lines are displayed. You can only approve, deny, or hold lines that are in a pending status.

2. Using the Action/Status field at the requisition line level, select an option for each requisition line that you want to approve, deny or put on hold.

3. Click the Submit button at the bottom of the page.

The Requisitions group box within the Manage Requisition Approvals page (partial page)

To approve, deny, or hold requisition lines using the Requisition Approval page:

1. On the Manage Requisition Approvals page, select the Requisition ID link to access the Requisition Approval page. This page displays the lines within one requisition that are pending an approval action.

2. In the Line Information group box, select one or more requisition lines by selecting the check box next to the line. You can also use the Select All option. You can only take action on lines that are in the pending status.

3. Enter comments in the Enter Approver Comments section at the bottom of the page. A comment is required before you can deny or hold a requisition line. Only one comment is allowed per save.

4. Click the Approve, Deny, or Hold button.

The Requisition Approval page (partial page)

Note. If commitment control is activated for approvals in PeopleSoft eProcurement, then you must add a row to the Source Transactions component. From the Source Transactions component, select the source transaction type of *REQ_PREENC.* and click the Selection Criteria tab. Add a row with a Field Name of *REQ_STATUS,* and a Field Value of *LA* .

Pushing Back Requisitions

To pushback a requisition line, access the Requisition Approval page and:

1. Select a line that is pending the approval.

2. Enter comments in the Enter Approver Comments section. This is required before you push back the requisition.

3. Click the Pushback button in the Line Information section. To push back the entire requisition, use the Pushback button under the Enter Approve Comments section.

Note. Requisition line approval appears as the Pushback button at the Line Information section.

Insert Ad Hoc Approvers
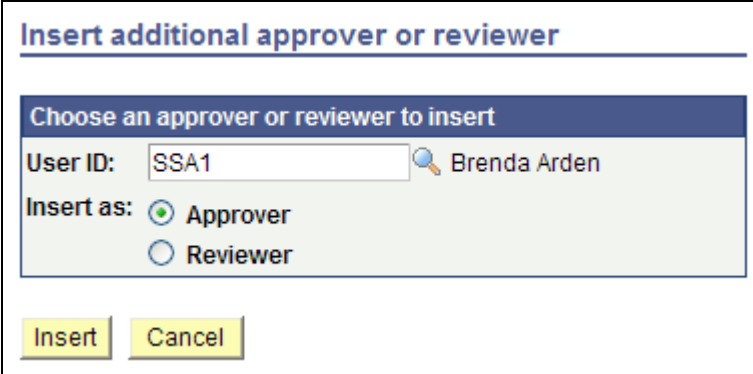
To insert ad hoc approvers and reviewers, go to the Requisition Approval page and click the plus + icon for a pending requisition line. The Insert additional approver or reviewer window appears for you to select the user ID and to indicate whether the person is an ad hoc approver or reviewer for this line.

You cannot change ad hoc approvers or reviewers; however, you can delete and add them again to indicate whether they are approvers or reviewers. To delete an approver or reviewer, click the minus – icon. To add multiple approvers or reviewers, click + at the point where you want the additional approver or reviewer to receive the approval.

For you to add ad hoc approvers and reviewers:

*   The user must by linked to a user role included in the eProcurement role action of ALLOW_ADHOC_ONPREVW. This eProcurement role action allows the user to add or remove ad hoc approvers while reviewing the requisition. In addition, you can use the ePro role action of ALLOW_ADHOC_ONSUBMIT to enable a user to add or remove ad hoc approvers when entering a new requisition.

*   Use the Ad Hoc User List field on the Configure Transactions page to limit the users that can be added as ad hoc approvers and reviewers. If this field is left blank, then any active user can be added as an ad hoc approver or reviewer.

When you click the + icon on the Review/Edit Approvers section of the Requisition Approval page, the following window appears:

Insert additional approver or reviewer page
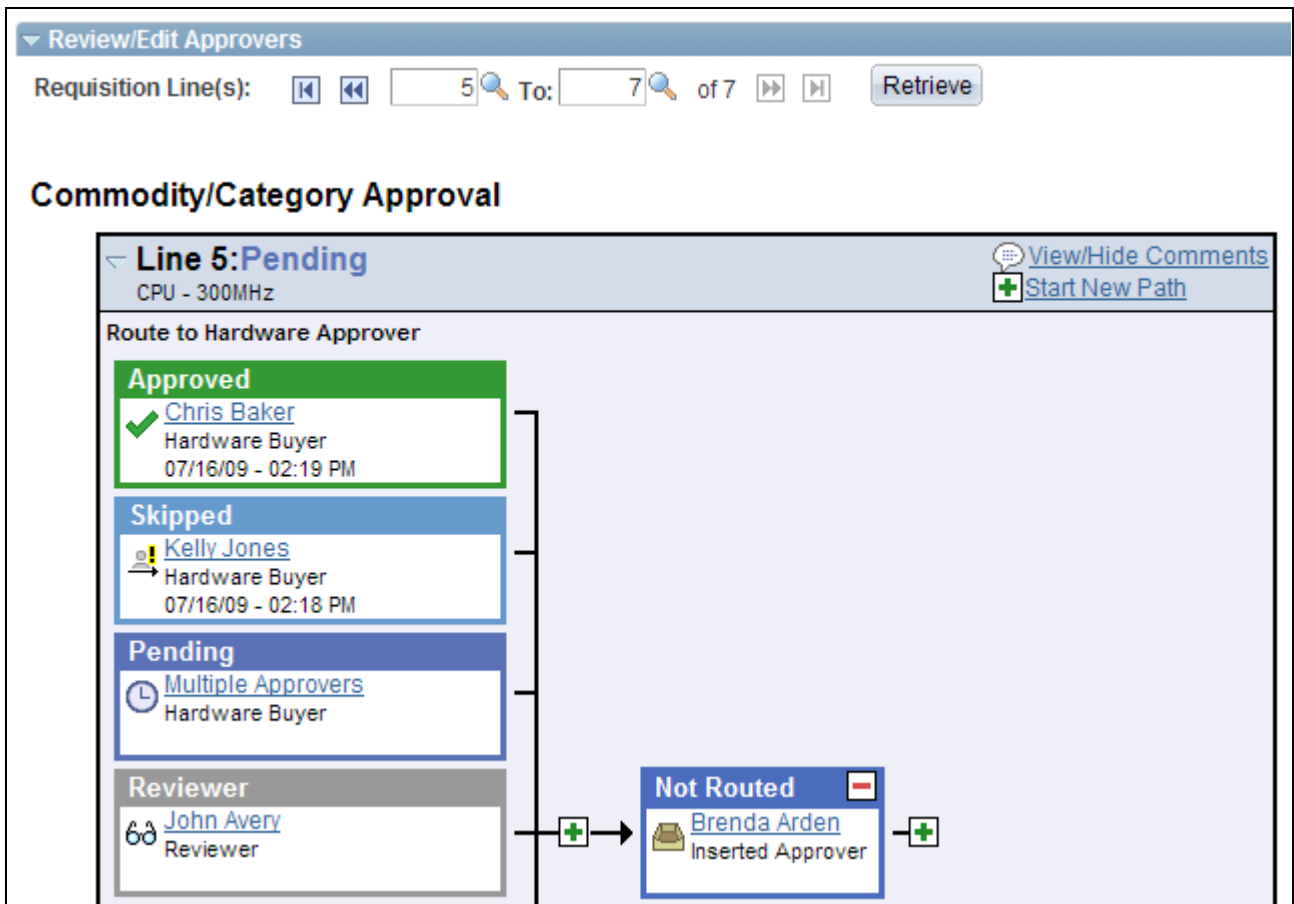
Review/Edit Approvals section after an ad hoc approver has been added (partial page)

Pages Used to Perform Approval Tasks for Requisitions

Page Name	Definition Name	Navigation	Usage
Manage Requisition Approvals	PV_APP_MAN_PG	eProcurement, Manage Requisition Approvals	View and take action on requisitions that require your approval or requisitions that previously required your approval.
Requisition Approval	PV_REQ_APPROVAL	• eProcurement, Manage Requisition Approvals Click the Requisition ID link. • Worklist, Worklist. For the work item, Approval Routing Click the Requisition ID link on the row.	Perform approval tasks on one individual requisition. You can view requisition details, enter comments, add ad hoc approvers and reviewer, as well as approve, deny, or hold a requisition line.

Page Name	Definition Name	Navigation	Usage
Requisition Line Details	None	On the Requisition Approval page, select one or more lines and click the View Line Details button.	View details about requisition line items.

Searching for Requisitions Requiring Approval

Access the Manage Requisition Approvals page (eProcurement, Manage Requisition Approvals).

Manage Requisition Approvals page

The Manage Requisition Approvals page enables you to view and take action on requisitions that require your approval or view requisitions that previously required your approval.

Use the Search Requisitions group box to search for requisitions needing your approval. Requisitions displayed are based on the user ID of the person accessing this page. You can limit the scope and number of requisitions that appear on the page. For example, you can limit the search results to a specific business unit, requester, or approval status. After displaying the requisitions, you can select individual requisitions to review and update.

Requisition ID   Select the specific system-assigned identifier of the requisition that you want to review or maintain. This limits the search results to one specific requisition.

Requisition Name	Select the name of a specific requisition that you want to view or maintain. This is the name the requester assigned to the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.
Business Unit	Select a business unit containing the requisitions that you want to review for approval.
Status	Select the status of the requisitions that you want to review for approval. Requisitions that appear in the search results are those in the status that you select and that meet the other search criteria that you enter. Status values are:
	Approved: Displays all requisitions that you have approved.
	Denied: Displays all requisitions that you have denied.
	On Hold: Displays all requisitions that you have placed on hold.
	Pending: Displays all requisitions that are waiting for your action.
	Pushedback: Displays all requisitions you have pushed back to the previous approver.
Date From and **Date To**	Select a range of dates to select requisitions to view.
Requester	Select the user who entered the requisitions.
Entered by	Select an operator for whom you want to manage requisitions. Operators are people who have created requisitions for someone else. Only the requisitions submitted by this operator appear in the list.
Show Advanced Search	Click to display additional search criteria to locate requisitions. Additional fields are Item/Job Title (for item description or job title) and Vendor ID.
Search	Click the Search button to initiate your search.
Clear	Click the Search button to erase your current search criteria in the Search Requisitions group box.
▷	Click the Expand All icon to display requisition detail including line and header-level information.
📇	Indicates that lines are pending approval for the requisition.
Req ID (requisition ID)	Click to access the Requisition Approval page, where you can perform approval tasks, such as approve, deny, or hold. In addition, you can add comments and add ad hoc approvers and reviewers.
!	Indicates that the requisition has a high priority. Priorities are assigned when the requisition is created or edited.
🕓	Indicates that a specific header or line is pending approval.

Mark All	Use the Mark All row to perform a mass approval or mass denial of several requisitions at one time. The Mark All row does not appear unless the user has the eProcurement role action of *MASS_APPROVER* attached to his user role.

- Click Approve to mark all displayed requisitions as *Approve* in the Action/Status field. You must save (submit) the page to perform this mass approval.

- Click Deny to mark all displayed requisitions as *Deny* in the Action/Status field. You must save (submit) the page to perform this mass denial.

- Click Hold to mark all displayed requisitions as *Hold* in the Action/Status field. You must save (submit) the page to perform this action.

Within the PeopleSoft Purchasing application, if a user has the authority to access the Manage Requisition Approvals component, then mass approval is allowed regardless of the eProcurement role action.

Create New Requisition	Click to access the Create Requisition page, where you can create a new requisition.
Manage Requisitions	Click to access the Manage Requisitions page, where you can work with requisition details.

Performing eProcurement Requisition Line Approval Tasks

Access the Requisition Approval page (eProcurement, Approve Requisitions. Click the Requisition ID link).

Requisition Approval

Business Unit: US100
Requisition ID: 0000000062
Req Name: 0000000062
Requester: Kelly Jones
Entered on: 07/16/2009
Status: Pending
Priority: Medium   Total Amount: 611.45 USD
Budget Status: Not Checked
Requester's Justification:
   No justification entered by requester.

View printable version

▼ Line Information

Line Information							Customize | Find | 🗗 First ◀ 1 of 1 ▶ Last	
	Line	Item Description	Vendor Name	Quantity	UOM	Price		Requester's Comments
☑ 🕐	1	CPU - 300MHz	PTC-SOFT-001	1.0000	EA	611.45000	USD	💬

☑ Select All / Deselect All
└ [View Line Details]   [☑ Approve]   [⊘ Deny]   [ℹ Hold]

Requisition Approval page (1 of 3)

Requisition Approval page (2 of 3)

Requisition Approval page (3 of 3)

Use the Requisition Approval page to perform your approval tasks, including:

* Approving one or more requisition lines. The line-level approval can be used only if the process ID is configured for line-level approval on the Register Transactions page.

* Denying one or more requisition lines.

* Placing one or more requisition lines on hold. This action inserts the requester as an ad hoc reviewer and requires you to enter comments to be sent to the requester.

* Pushing back one or more requisition lines. A pushback returns the line to the previous approval step.

* Adding or removing ad hoc approvers or reviewers.

* Reviewing an online requisition that shows the layout of the printed version.

* Making comments to be viewed by other approvers or reviewers.

The page displays details about the requisition, such as the requester, the date it was entered, the requisition name and ID, and the requisition priority. Also appearing is the total monetary value of the requisition and the currency used.

Note. If you select a line that does not require action, you receive a message telling you to select a line that is pending an approval.

Requester	Click to access the Requester Information page. This page displays details about who created the requisition, including the requester's supervisor and reporting structure, department, email ID, and telephone number.
	You can change the information displayed by modifying the approver information view that is registered on the Register Transactions page.
Requester's Justification	Displays any comments that the requester entered to justify the need for the requisition.
Edit Requisition	Click to access the Edit Requisition page, where you can change the requisition. Once you have made your changes and saved the requisition, you can use the Return to Approve Requisition link on the Confirmation page to return to this page as long as the approval workflow process is not restarted by your change. To make changes to the requisition without reinitiating workflow, your user ID must be linked to the appropriate eProcurement role action; these actions include, CANCHANGEALL, CANCHANGEHEADER, CANCHANGELINE, CANCHANGESCHEDULE, and CANCHANGEDISTRIB.
View printable requisition	Click to review an online requisition that shows the layout of the printed version. The requisition opens up as a second window and can be printed. The Oracle XML Publisher is used to generate this report, and you can customize it.

Line Information

Use this section of the Requisition Approval page to review requisition line details and perform approval tasks. Line items that are awaiting approval are highlighted and selected as default values when you access the page.

🕐	The Awaiting Approval icon appears with a requisition line to indicate that the line is pending approval.
Item Description	Click to view details about an item contained on a requisition. As you review approvals, you can see the item details and an image of the item.
Requester's Comments	Click to review comments made by the requester about a requisition line item.
Select All/Deselect All	Select this check box to select all line item check boxes; deselect this check box to deselect all line item check boxes. You can use this check box to approve or deny all lines or you can select individual check boxes for single approval or denials.
View Line Details	Click to access the Requisition Line Details page, where you can view details about the requisition line items that you selected.
Approve	Click to approve the selected requisition line items. When you approve a line-level or header-level item, the system routes the requisition line to the next approver and updates the approval status for the line.
Deny	Click to deny the selected requisition line items. Before the system accepts a denial, you must enter comments indicating why you did not approve the lines.

Hold   Click to put the selected requisition lines on hold. You must enter a comment that is sent to the requester. The requester is added as an ad hoc reviewer to this approval step.

Pushback   Select to return an approved requisition to the previous approver or requester with comments. This is possible only if a previous approver was in the same path. You cannot push back a requisition across stages.

Review/Edit Approvers

Use this section of the Requisition Approval page to review the approval flow, such as who approved the requisition before you and who will approve it after you. Click the plus + icon to insert ad hoc approvers and reviewers. If you want to remove an ad hoc approver or reviewer, click the minus ▬ icon.

To add ad hoc approvers and reviewers:

*   The user must be linked to a user role included in the eProcurement role action of ALLOW_ADHOC_ONPREVW. This eProcurement role action enables the user to add or remove ad hoc approvers while reviewing the requisition. In addition, you can use the ePro role action of ALLOW_ADHOC_ONSUBMIT to enable a user to add or remove ad hoc approvers when entering a new requisition.

*   All qualified ad hoc approvers or reviewers must be defined as part of the Ad Hoc User List on the Configure Transactions page.

Requisition Line(s), To. Use the Requisition Line(s) field and To field to enter a range of lines to view
and **Retrieve**   within the approval group box. These chunking fields are displayed if you have selected the Display Approval Chunking check box on the eProcurement Installation Options page.

Enter Approver Comments

Use this section to enter comments about the requisition. If you deny a requisition, the system requires that you enter a comment.

Viewing Details About Requisition Line Items

Access the Requisition Line Details page (On the Requisition Approval page, select one or more lines and click the View Line Details button).

Business Unit: US100			**Requester:** KELLYJONES			**Status:** Pending Approval	
Requisition: 0000000057			**Requested By:** Kelly Jones			**Currency:** USD	
Requisition Name: 0000000057			**Entered Date:** 7/15/09			**Requisition Total:** 1,038.34	

Line: 1   **Item Description:** Monitor 16inch   **Quantity:** 1.0000   **UOM:** EA   **Price:** 1,038.34   **Line Total:** 1,038.34

Line Status: Pending

Ship Line: 1   **Ship To:** US001   **Address:**   **Shipping Quantity:** 1.0000
Attention: Kelly Jones   **Due Date:**   144 North Street   **Shipping Total:** 1,038.34
                                                                    New York NY 10168 United States

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	US001	1.0000	100.00	1,038.34	US001	631000

Dept
13000

Open QTY	Open Amt
1.0000	0.000

GL Base Amount	Currency	Sequence	Capitalize
1,038.34	USD	0	N

Requisition Line Details page

Use this page to review shipping and accounting details for line items that you selected to review using the
Requisition Approval page.

Chapter 16

Changing Requisitions and Using Change Requests

This chapter provides an overview of changing an existing requisition, creating change requests, and discusses how to:

- Setup requisition changes and change requests.

- Change requisitions.

- View requisition change tracking history.

- View change requests.

- Process change requests in PeopleSoft Purchasing.

Understanding Requisition Changes and Change Requests

After submitting a requisition circumstances can change. You may need to change the original requisition, such as changing the quantity ordered, price, scheduled delivery date, or ship-to location. To change a requisition, use the Edit Requisition component. The changes are applied as follows:

- If no line of the requisition has been sourced to a purchase order, then any change you make to the requisition is used to update the requisition. If the commitment control feature is used then the system could required another budget check of the requisition. If the requisition had started or completed the approval workflow process, then the system may require the approved workflow to be restarted.

- If any line of the requisition has been sourced to a purchase order, then any change you make to the requisition is used to update the requisition and also creates a change request. The system could require that the changed requisition complete the same budget checking and approval workflow requirements as the original requisition. The change request is then picked up by the Change Purchase Order process (PO_POCHNG) and used to update the purchase order, create a change order, or create a new purchase order line.

When changing a requisition in PeopleSoft eProcurement, the system:

- Enables you to change fields on a requisition that is in the open, pending, approved, or sourced status. The field must be marked for change on the requisition change template used for this business unit. On the change template, select the Track Change check box to use the track change feature and also allow the fields to be changed on the Edit Requisition component in PeopleSoft eProcurement. However, once a requisition line has been sourced to a purchase order, the field can only be edited if the Update PO check box is also selected. The Update PO check box on the requisition change template identifies the field changes that would create a change request; for example, changing the requisition name would probably not require a change request but decreasing the item quantity would require a change request. If no requisition change template is defined for the business unit, then no change request can be created; you can increase the item quantity field resulting in a new demand line for the requisition but you cannot decrease the item quantity field.

- Enables you to cancel a requisition using the Requisition Details for: <requester> page within the Manage Requisitions component. You can cancel a requisition that has been sourced to a purchase order. If the cancellation completes budget checking and workflow approval, then the system creates a change request for cancelling the corresponding purchase order lines. However, a requisition line cannot be cancelled if it is associated to the only active schedule line on a purchase order. In addition, a requisition line cannot be cancelled if you are using Commitment Control and the line has not yet pass budget checking.

- If commitment control is used, the system automatically runs budget checking against pre-encumbrances and encumbrances when the merchandise amount is decreased on the requisition. The merchandise amount can be reduced on a requisition when you decrease the quantity or price.

- Automatically launches any necessary approvals for the change to the requisition using the Approval Workflow Framework feature. On the change template, select the Reapprove check box for each field that requires a re-approval when changed. The following field are selected by default and it is recommended that you keep the Reapprove check box selected on these fields: REQ_LINE.MERCHANDISE_AMT, REQ_LINE.PRICE_REQ, REQ_LINE.QTY_REQ, REQ_LINE_SHIP.MERCHANDISE_AMT, REQ_LINE_SHIP.PRICE_REQ, and REQ_LINE_SHIP.QTY_REQ. If no requisition change template is defined for the business unit, then any field changes start the re-approval of the requisition line using the approval framework feature.

- Tracks the changes made to any requisition and enables you to view the details about each change, the identity of the user who made the change, and when the change was made. One requisition could be changed multiple times and you can view each change. On the change template, select the Track Change check box for each field that requires change tracking to be recorded when the field is changed. Use the View Requisition Change Tracking History to view these tracked changes. If no requisition change template is defined for the business unit, then the change tracking feature does not record any changes.

- Enables the users to enter reason codes and comments to explain why they are changing the requisition. The reason code and comments can be required or optional. You can create reason codes that are appropriate for your business and then your users select the appropriate reason code. Reason codes using the *Procurement Change* reason type are selected by users entering a change to a requisition and change tracking.

The current status of the requisition is important when you want to change your request:

- If the requisition has not been sourced to a purchase order in PeopleSoft Purchasing, then changing the requisition results in an updated requisition.

- If the requisition has been sourced to a purchase order but not yet dispatched to the vendor, then changing the requisition results in an updated purchase order.

- If the requisition has been sourced to a purchase order and dispatched to the vendor, then changing the requisition results in the dispatch of a PO change order to the vendor.

- If the requisition has been sourced to a material stock request in PeopleSoft Inventory, then the requisition cannot be changed. You must alter the material stock request.

Rules for the Changing a Requisition and Creating Change Requests

The following rules apply when working with changes to a requisition and change requests:

- The new quantity cannot be less than the received quantity.

- Distribution line information cannot be changed.

- Changes to your requisition will be removed if the buyer or requisition approver denies the change in quantity or price on the requisition.

- A requisition line cannot be cancelled if it is associated to the only active schedule line on a purchase order.

- A change request cannot change a value where that field is tied to a PO change order that is pending buyer approval.

- If a requisition line with a special request item is sourced to a purchase order, you can change item price.

- If the requisition line has already been sourced to a purchase order and you increase the item quantity, then a new schedule line for the increase in quantity may be added to the requisition line.

- If commitment control is being used, a change to quantity or price that alters the amount of the requisition is not allowed if the purchase order to which it is associated does not have a header budget status of valid.

- If commitment control is being used, a reduction in the merchandise amount (due to a decrease in item quantity or price) will automatically trigger the budget checking process for pre-encumbrances and encumbrances.

When a requisition line has been sourced to multiple purchase order lines, then some requisition changes are not allowed. The following table outlines these restrictions:

Change to the Requisition Line	Requisition Line Sourced to One PO Line	Requisition Line Sourced to Multiple PO Lines
Item quantity is decreased	Allowed	Disallowed, if a requisition line is sourced to multiple purchase order lines, you cannot reduce the item quantity.
Item quantity is increased	Allowed	Allowed, if the requisition line has already been sourced to multiple purchase order lines, then a change request is not created; instead, a new requisition schedule line for the increase in quantity is added to the requisition line. This new schedule line follows the normal business process flow and is available to be sourced to a different purchase order.
Item price is changed (increase or decrease)	Allowed	Disallowed, if a requisition line is sourced to multiple purchase order lines, you cannot change the item price.

Process Flow for Changing Requisitions and Creating Change Requests

The following diagram illustrates the process flow for changing a requisition:
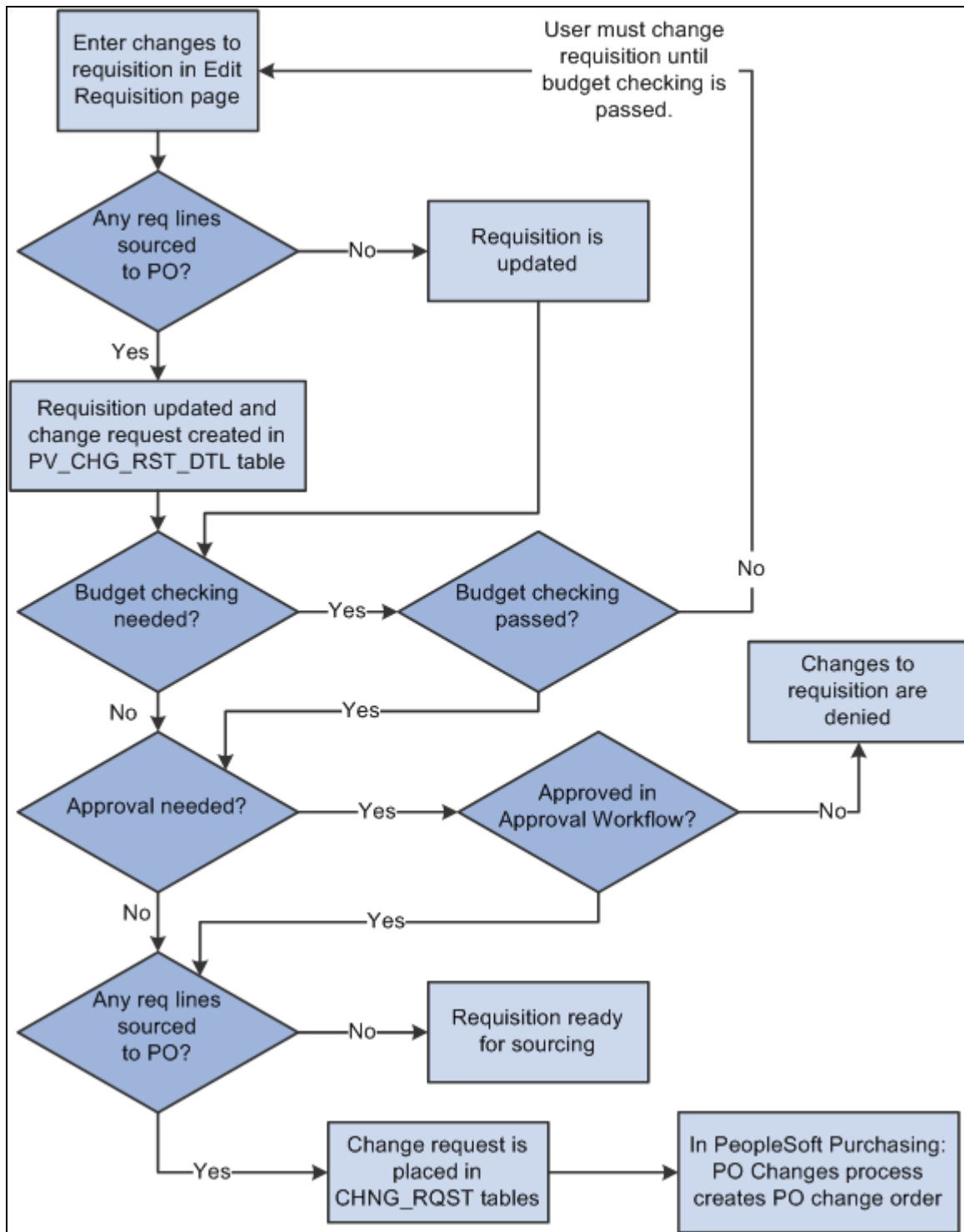
The business process flow for changing a requisition

The business process flow for changing a requisition includes:

- Use the Edit Requisitions component to make changes to the original requisition. When you save your changes the requisition is updated. If you are using the Change Tracking feature, then you can use the View Requisition Change Tracking History page to compare the original requisition to the changed requisition.

- If commitment control is used, then the requisition must pass budget checking before the requisition changes can move forward. The PeopleSoft commitment control feature enables you to check expenditures against a predefined budget. In PeopleSoft eProcurement, these expenditures occur when a requisition is entered and a pre-encumbrance or encumbrance is established. For further information on setting up commitment control, see the PeopleSoft Enterprise Commitment Control PeopleBook.

- For requisition lines that have not been sourced to a purchase order (that is, requisition lines with the status of open, pending, or approved), the requisition is updated but no change request is created. Based on the Reapprove check box on the requisition change template for this business unit, the requisition may require re-approval by the approval workflow framework. Keep in mind that you cannot change a requisition line that has been sourced to a material stock request in PeopleSoft Inventory.

- For requisition lines that have already been sourced to a purchase order, the requisition is updated and a change request is created. This change request is placed in the PV_CHG_RST_DTL table with a status of pending.

- The Approval Workflow Framework feature is used to route the changed requisition to the correct people for approval or denial. The requisition change template identifies the field changes that require a re-approval of the requisition. If one approver denies the requisition or requisition line, then the changes are removed from the requisition, the change request is canceled, and the business process flow ends. If the changed requisition passes all approvals, then the Approval Workflow Framework sets the requisition to the approved status. For a requisition that has not been sourced to a purchase order, this completes the process flow. If the requisition has been sourced to a purchase order (and a change request was created) then the status of the change request in the PV_CHG_RST_DTL table is changed from pending to approved. In addition, the change request is also placed in the CHNG_RQST and CHNG_RQST_DTL tables to be picked up by the Change Purchase Orders process.

  Note. If budget checking and approval workflow are not needed, then the change request is placed in the PV_CHG_RST_DTL, CHNG_RQST and CHNG_RQST_DTL tables when the changed requisition is saved.

- In PeopleSoft Purchasing, the Change Purchase Order process picks up the change requests in the CHNG_RQST, and CHNG_RQST_DTL tables, updates the purchase order, and might create a change order for a dispatched purchase order.

See Chapter 12, "Managing Requisitions in PeopleSoft eProcurement," Editing Requisitions, page 326.

See Also

Chapter 15, "Using the Approval Framework in PeopleSoft eProcurement," page 403

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Tracking Requisition Changes"

Common Elements Used in This Chapter

Change Request   A transaction containing changes to a requisition that has already been sourced to one or more purchase orders. Once the changed requisition has been budget checked and approved (if necessary), the change request is picked up by the Change Purchase Orders process in PeopleSoft Purchasing and used to update the purchase order and create a change order for dispatched purchase orders.

Change Order   A copy of a dispatched purchase order that highlights changes to the original purchase order that has already been sent to the vendor. The change order alters the original dispatched purchase order and is submitted to the vendor. You can create a change order in PeopleSoft Purchasing. A change request created in PeopleSoft eProcurement can become a change order in PeopleSoft Purchasing.

Setting Up Requisition Changes and Change Requests

Complete the following steps to setup your PeopleSoft eProcurement system to change requisitions and create change requests:

1. Define reason codes using the reason types of *Procurement Change*.

2. Define reason code and comment settings using the Procurement Change Reason Codes page.

3. Define a change template for requisitions to identify when changes to a requisition should be tracked on the View Requisition Change Tracking History page, when the requisition or requisition line should require re-approval by the approval workflow framework, and when a change request should be created for a sourced requisition. Change templates identify which field changes on a requisition cause the system to generate these actions. To create a change template for requisitions, use the change template type of Requisition.

4. On the Purchasing Definition component, attach a requisition change template to the purchasing business unit that you use to create eProcurement requisitions. In addition, select a value for the Change Option field for requisitions; this field determines if change tracking should be initiated based on the status of the requisition.

5. Setup the approval workflow framework to provide the approval workflow for your requisitions. The original requisition and the changed requisition follow the same approval process.

6. Select or un-select the Allow Changes to Dispatched POs check box on the eProcurement Business Unit Options page. In some cases, especially with direct connect suppliers, you may not want to change the sourced requisition once the purchase order has been dispatched. Select this check box to enable users to change a requisition line when it has been source to a purchase order and the purchase order has already been dispatched. This value can be overridden by the same option on the linked supplier's Supplier Properties page (ALLOW_PO_CHNG = N).

7. Enable changes to a requisition that has been sourced to a dispatched purchase order based on the individual direct connect vendor. On the linked supplier's Supplier Properties page, enter the property name, ALLOW_PO_CHNG, and select a value of Y or N. If the vendor allows changes to dispatched purchase orders, then enter the value of *Y.* If the vendor does not allow changes to dispatched purchase orders, then enter a value of *N.*

8. Enable eProcurement role actions to specific user roles using the eProcurement Role Actions page. The following role actions can enable or disable features for changing a requisition:

   • *ALLOW_CHANGE_REQUEST:* Users are allowed to edit requisitions and create change requests to a line that has been sourced to a purchase order.

   • *CANCHANGEALL:* Enables a requester to change any field on the requisition without restarting the approval process while the requisition is in a pending status.

   • *CANCHANGEDISTRIB:* Enables the requester to change any field on the requisition distribution without restarting the approval process while the requisition is in a pending status.

   • *CANCHANGEHEADER:* Enables the requester to change any field on the requisition header without restarting the approval process while the requisition is in a pending status.

   • *CANCHANGELINE:* Enables the requester to change any field on the requisition line, with the exception of quantity and price, without restarting the approval process while the requisition is in a pending status.

   • *CANCHANGESCHEDULE:* Enables the requester to change any field on the requisition schedule without restarting the approval process while the requisition is in a pending status.

   • *NOVICEREQSTR:* Provides a quick-access interface for requisitions where novice requesters can add an item, have the quantity of one added, and display the Summary page. In addition, this role action hides the track batch number that indicates the number of times that a requisition has been changed.

Pages Used to Set Up the Change Request Feature

Page Name	Definition Name	Navigation	Usage
Reason Codes	REASON_CD	Set Up Financials/Supply Chain, Common Definitions, Codes and Auto Numbering, Reason Codes	Define reason codes which provide explanations for many occurrences within PeopleSoft. When creating reason codes for changes to a requisition, use the reason types of *Procurement Change.* Reason codes using the *Procurement Change* reason type can be selected by users when changing a requisition. If you have required comment to be entered when a user changes a requisition, then the Description field on the Reason Codes page is used as the default comment on the requisition.
Procurement Change Reason Codes	BUS_OPT_PM_REASON	Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Options. Click the Change Reason Codes link on the Processing Options page.	Define settings for reason codes and comments used when changing a requisition in PeopleSoft Purchasing, eProcurement, and Services Procurement. These settings enable you to define default reason codes and determine if reason codes or comments should be required. You can define the default reason code for the reason type of *Procurement Change.* See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Defining Reason Codes for Change Requests and Change Orders.

Page Name	*Definition Name*	*Navigation*	*Usage*
Change Template	CHNG_ORD_TEMPLATE	• Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Change Template • eProcurement, Administer Procurement, Maintain Procurement Options, Change Template	Define change templates to identify when changes to a requisition should be tracked on the View Requisition Change Tracking History page, when the requisition or requisition line should require re-approval by the approval workflow framework, and when a change request should be created for a sourced requisition. Change templates identify which field changes on a requisition cause the system to generate these actions. To create a change template for requisitions, use the change template type of Requisition. The following field on the REQ_LINE and REQ_LINE_SHIP records are selected for re-approval by default and it is recommended that you keep the Reapprove check box selected on these fields: • MERCHANDISE_AMT • PRICE_REQ • QTY_REQ On the Change Template page, if you select the Track Change check box for the SHIPTO_ID field, then the system tracks changes to both the SHIPTO_ID field and the One Time Address fields. In addition, if you select the Track Change check box for the STATUS field in the REQ_COMMENTS table, then the system enables you to see deleted comments in the change tracking feature (PeopleSoft eProcurement only). See *PeopleSoft Enterprise Source-to-Settle Common*

Page Name	Definition Name	Navigation	Usage
			Information 9.1 PeopleBook, "Defining Procurement Options," Creating Change Templates.
Req Change Options	BUS_UNIT_REQ_APPR	Set Up Financials/Supply Chain, Business Unit Related, Purchasing, Purchasing Definition, Req Change Options	Define the Change Option field, the change template for requisition changes, and approval requirements for each business unit. The Change Option field determines if change tracking should be initiated for changes to a requisition based on the status of the requisition (approved, sourced, and valid budget checked). The Change Template entered on this page is used by PeopleSoft Purchasing, eProcurement, and Services Procurement. Select the Resubmit Workflow for Quantity and Price Decrease check box to require approval of a changed requisition with a decrease in item quantity or price. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Defining Requisition Change Options and Approval Requirements.

Page Name	*Definition Name*	*Navigation*	*Usage*
eProcurement Business Unit Options	PV_BUS_UNIT_PM	eProcurement, Administer Procurement, Maintain Business Units. Click the eProcurement Business Unit Options link on the Maintain Business Units page.	Select the Allow Changes to Dispatched PO check box to enable users to create a change request when the requisition line has been source to a purchase order and the purchase order has already been dispatched. Un-select to prevent users from creating a change request when the purchase order has already been dispatched. See Chapter 4, "Determining Functional Implementation Options," Maintaining Business Units, page 65.
Supplier Properties	PV_MS_SEC_SUP_NV	eProcurement, Administer Procurement, Maintain Supplier Integration, Linked Suppliers. Select the Supplier Properties tab on the Linked Supplier page.	Define linked supplier properties for integration to the Oracle Supplier Network, a marketplace, and a direct connect suppliers. If the vendor allows changes to dispatched purchase orders, then enter a value of Y for the property name ALLOW_PO_CHNG. If the vendor does not allow changes to dispatched purchase orders, then enter a value of N. See Chapter 9, "Integrating with Direct Connect Suppliers," Defining Linked Suppliers for PunchOut, page 221. See Chapter 9, "Integrating with Direct Connect Suppliers," Defining Linked Suppliers for RoundTrip, page 225.
eProcurement Role Actions	PV_ACTIONS	eProcurement, Administer Procurement, Maintain System Users and Roles, eProcurement Role Action	Attach role actions to user roles. See Chapter 3, "Determining Technical Implementation Options," Attaching Role Actions to User Roles, page 39.

Changing Requisitions

Using the Edit Requisitions page, you can change an existing requisition that has been approved, sourced to a purchase order, or sourced to a dispatched purchase order. Use the Manage Requisitions page to determine the status of your requisition.

To make changes to the requisition header or requisition lines, go to the Manage Requisitions page, locate the requisition you wish to change, select *Edit* in the Select Action field, and click the Go button. Make your changes on the Edit Requisition page. When you save the page:

- The requisition is updated with your changes. If you change a requisition where no requisition lines have been sourced, then the system updates the requisition. If you change a requisition that has one or more lines that have already been sourced to a purchase order, then the system updates the requisition and creates a change request. You can edit any line has that been dispatched, but not closed, as long as change requests are allowed for the dispatch status. Changes to dispatched purchase orders can also be limited by your setup.

- A pop-up window displays where you can enter a reason code and comments. A reason code or comment can be required or optional based on your settings on the Procurement Change Reason Codes page.

- The Change Tracking feature is invoked based on the status of your requisition, your requisition change template, and the setting in the Change Option field of the Purchasing Definition-Req Change Options page. The Change Tracking feature includes changes to any fields marked for track change on the template, the user who modified the requisition, and the date and time of each change. This information is written to the REQ_CHNG_HDR, REQ_CHNG_LINE, and REQ_CHNG_SHIP tables. If the Change Tracking feature is used, a track batch sequence number is added to the top of the Edit Requisition page. PeopleSoft eProcurement and Services Procurement share the same track batch number sequence. For a requisition that is altered more than once, the track batch sequence number is increased by one for each time you change the requisition. If your user ID is linked to the eProcurement role action of NOVICEREQSTR, then the track batch sequence number does not display.

- If any fields have been changed which are marked as needing re-approval on the requisition change template, then the approval workflow framework is initiated. The changed requisition must complete the approval process from the beginning. Role actions take precedent over the template settings in determining whether re-approval is required.

Pages Used to Change Requisitions

Page Name	Definition Name	Navigation	Usage
Edit Requisition	ePV_REQ_FORM	eProcurement, Manage Requisitions. Select Edit in the Select Action field and click the Go button.	Make changes to an existing requisition. Your changes here can update the requisition, record change tracking, and restart approval workflow. For sourced requisitions, your changes can generate a change request.

Page Name	Definition Name	Navigation	Usage
Change Reason	REQ_CHNG_REASON	• Save a requisition after entering changes on the Edit Requisition page. • For an existing requisition with changes, click the Current Change Reason link on the Edit Requisition page.	Enter a reason code and comment for the changes that you have made to the requisition. This information is stored in the requisition change request tables (REQ_CHNG_REASON).
Confirmation	PV_REQ_WF_PREVIEW	• Click the OK button on the Change Reason page. • If no reason code is needed, click the Save and Preview Approvals button on the Review and Submit page	Displays information after you save the requisition. The Budget Status field and the requisition Status field will change if your requisition changes prompt budget checking and re-approval of the requisition. In addition the Change Request/Line Approval Summary group box displays requisition line information for change requests and approval workflow.

Changing a Requisition Using the Edit Requisition Page

Access the Edit Requisition page (eProcurement, Manage Requisitions. Select *Edit* in the Select Action field on the Manage Requisitions page).

Edit Requisition page

This section only discusses the fields on the Edit Requisition page that are related to changing an existing requisition and creating change requests. For more information about the Edit Requisition page, see the "Managing Requisitions in PeopleSoft eProcurement" chapter.

Track Batch	Displays the track batch (change batch) sequence number. This field only displays if you have changed a field marked for track change on the requisition change template. The first time that you save a changed requisition, the system displays Track Batch 1 in the requisition header. Each time that you make a change to the requisition, the system increases the track batch number by one. The track batch sequence number is displayed on the View Requisition Change Tracking History page to distinguish one change from another change and from the original field value.
	If your user ID is linked to the eProcurement role action of NOVICEREQSTR, then the track batch sequence number does not display.
	The Sourced to Purchase Order icon displays to the right of the Line number and indicates that the requisition line has been sourced to a purchase order line. If the line has not yet been sourced to a purchase order, no icon is displayed.

The Unavailable for Edit icon displays to the right of the Line number and indicates that the requisition line cannot be changed. Users cannot edit requisition lines when:

- The line have been submitted for an RFQ (request for quote).

- Sourcing is in process for the requisition line.

- A sourcing event is in process for the line item.

- The line is sourced to Inventory

- The line is a Services Procurement requisition line that has been sourced.

Click the Details button to access the Line Details (PV_REQ_LINE_DTLS) page to change requisition line details.

Modify Line/Shipping/Accounting
Click to access the Modify Shipping/Accounting page, where you can change the shipping location, delivery date, quantity in the shipment, and so on. You can also change the accounting information for this requisition line.

You can make changes to one or more lines at one time; however, sourced lines may not accept all changes that you make on this page.
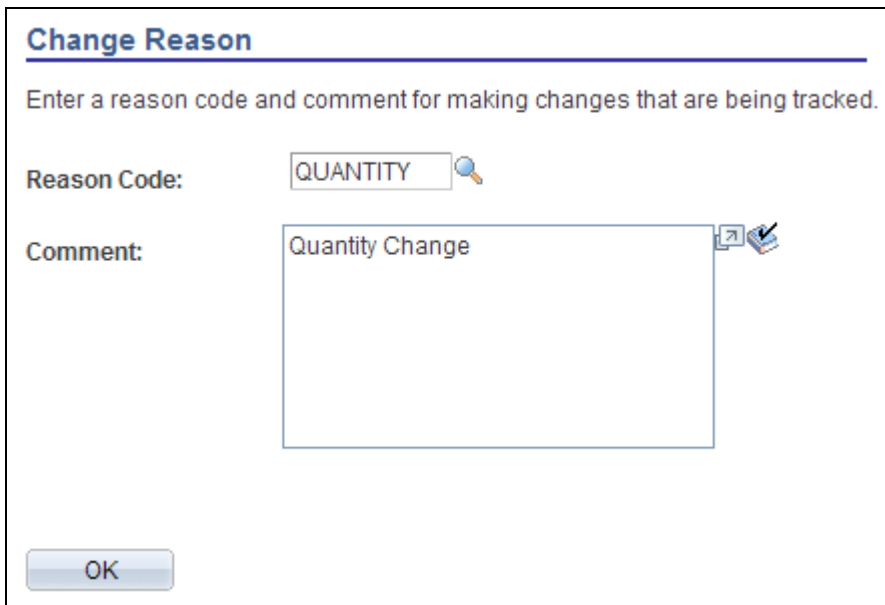
Delete
Click to delete selected requisition lines. You cannot use this button to delete a requisition line that has not passed budget checking when Commitment Control is used.

Current Change Reason
Click this link to access the Change Reason page where you can view the reason code and comments attached to this changed requisition.

Entering Reason Codes and Comments

Access the Change Reason page (Save a requisition after entering changes on the Edit Requisition page).

Change Reason page

Use the Change Reason page to view or change the reason code and comments attached to a changed requisition. A default value for the reason code can be defined on the Procurement Change Reason Codes page to be used by any changed requisition in the Purchasing business unit. In addition, the Description field for the default reason code (entered on the Reason Codes page) is used as the default comment on the requisition.

Confirming Requisition Changes

Access the Confirmation page (Click the Save and Preview Approvals button on the Review and Submit page or click the OK button on the Change Reason page).

Confirmation page

This section only discusses the fields on the Confirmation page that are related to changing an existing requisition and creating change requests. For more information about the Confirmation page, see the "Creating Requisitions in PeopleSoft eProcurement" chapter.

Status	Displays the status of a requisition. Values are *Open, Pending, Approved,* and *Complete.*
Budget Status	If the Commitment Control feature is turned on, then this field displays the current budget checking status for this requisition.

Change Request/Line Approval Summary

This group box displays if you have changed an existing requisition.

Change Request	Displays the change request created for this requisition line. Change requests are only created if the requisition line has been sourced to a purchase order and your system is setup to allow change requests.

Line Re-Approval   Displays the current state for workflow approval for this line. If you have
                              changed a field marked for re-approval on the requisition change template, then
                              the approval workflow framework resets this requisition line to the pending
                              status and the approval process must be completed again from the beginning.

Viewing Requisition Change Tracking History

The Change Tracking feature provides you with an audit trail of key transactional information including,
changes to any fields marked for track changes on the change template, the user who modified the requisition,
and the date and time of each requisition change request. This information is written to the
REQ_CHNG_HDR, REQ_CHNG_LINE, and REQ_CHNG_SHIP tables. For a requisition that is altered
more than once, the track batch (change batch) sequence number is increased by one for each time you
change the requisition. If your user ID is linked to the eProcurement role action of NOVICEREQSTR, then
the track batch sequence number does not display. The Change Tracking feature is invoked base on the status
of your requisition, your requisition change template, and the setting in the Change Option field of the
Purchasing Definition-Req Change Options page. If no requisition change template is defined for the business
unit, then the change tracking feature does not record any changes.

Pages Used to View Requisition Change Tracking History

Page Name	Definition Name	Navigation	Usage
Requisition Change Tracking History	PV_CHNG_TRK_HIST	eProcurement, Manage Requisitions. On the Manage Requisitions page, click the Review Change Tracking link.	View the changes that have been made to this requisition. This page includes changes to any fields marked for track change on the requisition change template used for this business unit. You can review the change made to the field, the user who modified the requisition, and the date and time the changed requisition was saved.
Change Tracking Filter Criteria	PV_CHNG_FILTER	Click the Filter Criteria link on the Requisition Change Tracking History page.	Enter filters to narrow your display results on the Requisition Change Tracking History page. Filter criteria are applied to one individual requisition and help you focus on a particular type of change, especially with a requisition containing many lines or multiple changes.

Page Name	Definition Name	Navigation	Usage
Change Reason Code	PV_CHANGE_REASON	Click the reason code link in the Reason Codes column of the Requisition Change Tracking History page.	Review the reason code and comments added when the requisition was changed.
Deleted Comments	PV_REQ_CHNG_CMMT	• Click the Header Comments link within the Header Changes group box on the Requisition Change Tracking History page. • Click the Line Comments link within the Line Changes group box on the Requisition Change Tracking History page. • Click the Ship To Comments link within the Header Changes group box on the Requisition Change Tracking History page.	Displays comments that have been deleted from the requisition at the header, line, or ship to level. In order to see deleted comments, you must select the Track Change check box for the STATUS field in the REQ_COMMENTS table. The ability to see deleted comments is only available for PeopleSoft eProcurement.
Requisition Change Tracking One Time Address	PV_REQ_CHNG_ADDR	Click the One Time Address link on the Requisition Change Tracking History page.	View the one time shipping address added to a requisition line.

Using the Requisition Change Tracking History Page

Access the Requisition Change Tracking History page (On the Manage Requisitions page, click the Review Change Tracking link).

Requisition Change Tracking History

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

*Business Unit:	US100		Requisition Name:	
Requisition ID From:			Requisition ID To:	
Requester:	KELLYJONES		Modified By:	
Date From:	07/13/2009		Date To:	07/20/2009

[Search] [Clear]

Requisition Change Tracking

To view requisition change tracking history detail records, click the Expand triangle icon: ▷

Req ID	Requisition Name	Requester Name	Modified By	Last Changed	Track Batch	Filter By
0000000072	Team building trip supp...	Kelly Jones	Kenneth Schumacher	07/20/2009 3:15:57PM	1	Filter Criteria

Header Changes   Customize | Find | View All | | First 1-2 of 2 Last

Batch	Seq	Change Type	Description	Value	Modified By	Last Changed	Reason Code
1	1	Change	Requisition Name	Team building trip s......	VP1	07/20/2009 3:15:57PM	QUANTITY
0	0	Original	Requisition Name	Outdoor supplies	VP1	07/20/2009 3:15:57PM	

Line Changes   Customize | Find | View All | | First 1-5 of 5 Last

Line	Batch	Seq	Change Type	Description	Value	Modified By	Last Changed	Reason Code
1	1	1	Change	Merchandise Amount	500.00000	VP1	07/20/2009 2:49:36PM	QUANTITY
1	1	1	Change	Requisition Quantity	100.00000	VP1	07/20/2009 2:49:36PM	QUANTITY
1	1	2	Deleted	Line Comments	Line Comments	VP1	07/20/2009 3:04:03PM	QUANTITY
1	0	0	Original	Merchandise Amount	5.00000	VP1	07/20/2009 2:49:36PM	
1	0	0	Original	Requisition Quantity	1.00000	VP1	07/20/2009 2:49:36PM	

Requisition Change Tracking History page (1 of 2)

Requisition Change Tracking History page (2 of 2)

Search Requisitions	Use the Search Requisitions group box to enter search criteria to display one or more requisitions. The Business Unit is a required field. Click the Search button to display requisitions matching your criteria in the Requisition Change Tracking group box.
Req ID	Click the requisition ID link to access the Requisition Details page (PV_REQ_PO_DTLS).
	See Chapter 12, "Managing Requisitions in PeopleSoft eProcurement," Viewing Requisition Details, page 323.
Filter Criteria	Click this link to access the Filter Options page where you can specify filters to narrow your display results. Filter criteria are applied to one individual requisition and help you focus on a particular type of change, especially with a requisition containing many lines or multiple changes.

In the Header Changes, Line Changes, and Schedule Changes group boxes, you can view the changes made to the requisition at each of these levels. The following columns are used:

Line and **Sched**	Displays the requisition line and requisition schedule line.

Batch and **Seq**	The Batch and Sequence columns display the chronological order of the changes to the requisition. The most recent changes are displayed at the top of the grids.

The Batch number represents the number of times the requisition has been changed and saved. Zero reflects the original creation of the entire requisition.

The Sequence number represents the number of times the header, line, or shipment schedule line has been changed.

When the requisition is first created, both the batch and sequence numbers are zero. The original value for a field is always displayed at the bottom of the change list. You may need to use the Last link in the group box header to see the original values.

With changes to the requisition, the batch and sequence number change. For example:

1. You create and save a requisition with 3 lines. The batch and sequence numbers for the header, line, and shipment schedule are all zero.

2. You change line 3 of the requisition and save your changes. The batch number is 1 and the sequence number for line 3 is 1; however, the header and other lines were not changed and are at sequence number zero.

3. You change the header of the requisition and line 1 and then save your changes. The batch number is now 2 (You have changed the requisition twice). For the header the sequence is 1 within batch number 2 (You have changed the header data once) and line 1 is also sequence number 1 within batch 2. Line 3 remains sequence 1 within batch 1.

Change Type	Displays the category of the change. The options are:

- *Change:* The field value was changed.

- *Deleted:* The field value was deleted.

- *Inserted:* One or more blank fields were populated.

- *Original:* Displays the field value when the requisition was first created.

Description	Displays a description of the field or fields that were changed.

Value	Displays the changed, inserted, or original field value entered on the requisition or a link to another page that displays the values. Links include:

- *One Time Address:* Click to access the Requisition Change Tracking One Time Address page where you can view the one time address fields added to this requisition schedule line.

- *Header Comments:* Click to access the Delete Comments page and view comments that have been deleted from the header level of the requisition.

- *Line Comments:* Click to access the Delete Comments page and view comments that have been deleted from the line level of the requisition.

- *Ship To Comments:* Click to access the Delete Comments page and view ship to comments that have been deleted from the requisition.

Modified By	Displays the user ID of the person who changed the requisition.
Last Changed	Displays the date and time of the last change to this field.
Reason Code	Displays the reason code entered when this change was made. Click this link to access the Change Reason Code page where you can review the reason code and comments added when this requisition was changed. This column does not display if a reason code was not entered.

Using the Filter Criteria in Change Tracking

Access the Change Tracking Filter Criteria page (Click the Filter Criteria link on the Requisition Change Tracking History page).

The Change Tracking Filter Criteria page

Use the Change Tracking Filter Criteria page to narrow the information displayed about an individual requisition. Once you enter values in this page, the filter limits the requisition details displayed on the Requisition Change Tracking History page. If no requisition details match your filter then a message is displayed on the Requisition Change Tracking History page. To see all of the requisition details after applying a filter, you must enter this page and clear the filter criteria.

Reason Code	Enter a reason code to limit the rows displayed to changes made with this reason code.
Change Track Batch	Enter the batch number to be displayed. Only changes made with this batch number are displayed for the requisition.
Requisition Header	Limit the requisition header details displayed to changes in the requester or currency code.
Requisition Line	Limit the requisition line details displayed to changes in item category ID, item ID, merchandise amount, requisition price, or requisition quantity.
Requisition Schedule	Limit the requisition schedule line details displayed to changes in the attention to field, merchandise amount, requisition price, requisition quantity, or ship to location.

Viewing Deleted Comments

Access the Deleted Comments page (On the Requisition Change Tracking History page, click one of the following links: Header Comments, Line Comments, or Ship To Comments).

Delete Comments page showing line comments that were deleted

Use the Deleted Comments page to view comments that have been deleted from the requisition header, line, or ship to levels. In order to see deleted comments, navigate to the requisition Change Template page and select the Track Change check box for the STATUS field in the REQ_COMMENTS table. The ability to see deleted comments is only available for PeopleSoft eProcurement.

Track Batch	Displays the track batch number of the change that deleted the comment.

Modified By   Displays the user ID of the person who deleted the comment.

Comment Type   The comment types are:

- *HDR*

- *LIN*

- *SHP*

Comments   Displays the comment that was deleted.

Viewing One Time Address Changes

Access the Requisition Change Tracking One Time Address page (Click the One Time Address link on the Requisition Change Tracking History page).

Requisition Change Tracking One Time Address page

View the one time shipping address added to a requisition line.

On the Change Template page, if you select the Track Change check box for the SHIPTO_ID field, then the system tracks changes to both the SHIPTO_ID field and the One Time Address fields.

Viewing the Change Reason Codes Page

Access the Change Reason Codes page (Click the reason code link in the Reason Codes column of the Requisition Change Tracking History page).

Change Reason Codes page

Review the reason code and comments added when the requisition was changed. This reason code could be required, optional, or not used based on your entries in the Procurement Change Reason Codes page.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Defining PeopleSoft Purchasing Business Units and Processing Options," Defining Reason Codes for Change Requests and Change Orders.

Viewing Change Requests

The Review Change Requests inquiry page enables you to view the existing change requests.

Pages Used to View Change Requests

Page Name	Definition Name	Navigation	Usage
Review Change Requests	PV_CHNG_RQST_LIST	eProcurement, Manage Requisitions Click the Inquire Change Request link on the Manage Requisitions page.	Monitor change requests. This page enables you to monitor the approval status of your change requests.

Using the Review Change Requests Page

Access the Review Change Requests page (eProcurement, Manage Requisitions. Click the Inquire Change Request link on the Manage Requisitions page).

Review Change Requests

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

*Business Unit:	US001 🔍	Requisition Name:	
Requisition ID From:	🔍	Requisition ID To:	🔍
Requester:	🔍	Entered By:	🔍
PO ID:	🔍	Change Request Status:	▼
Change Date From:	07/13/2000 📅	Change Date To:	07/20/2009 📅

[Search] [Clear]

Requisition Change Requests

To view requisition change request detail records, click the Expand triangle icon: ▷

	Requisition ID	Requisition Name	Purchase Order	Change Date/Time	Re-Approval Status	Change Request Status	Processing Error
▷	0000000141	0000000141	0000000204	06/22/2009 11:54:45AM	Approved	Ready for Process	
▷	0000000140	0000000140	0000000204	06/22/2009 11:56:11AM	Approved	Ready for Process	
▽	0000000091	0000000091	0000000057	08/05/2003 3:34:28PM	Approved	Initialize	

Requester: Kenneth Schumacher   **Entered By:** Theresa Monroe

Change Request Details   Customize | Find | View All | ↗ | 🆄 | First ◀ **1 of 1** ▶ Last

[Change Requests] [Change Reason] [Processing Errors] [⌨▶]

Line	Sched	Change Date/Time	Item Description	Change Type	Field	Prior Value	Changed Value	Re-Approval Status	Change Request Status
1	1	08/19/2003 11:27:53AM	775-fill Mummy Sleeping Bag	Change	Ship To Location		US002	Approved	Initialize

Return to Manage Requisitions   Approve Change Requests

Review Change Requests page

Review Change Requests page

Search Requisitions group box

Enter search criteria and the click the Search button to display change requests in the Requisition Change Requests group box.

Business Unit Enter the Purchasing business unit of the change request. This is a required field.

Requisition ID From and **Requisition ID To** Enter one or a range of requisition IDs.

Entered By Search by the user ID who entered the requisition. This is the REQ_HDR.OPRID field in the REQ_HDR table.

Change Process Status	Select the status of the change requests you want to view. This is the CHG_PROCESS_STATUS field in the CHNG_RQST_DTL table. Values are:

- *Initialized:* The change request has been added but it has not been picked up by PeopleSoft Purchasing.

- *In Process:* The system is currently using this change request to update a purchase order and maybe build a PO change order.

- *Complete:* The purchase order has been updated with the changes from this change request and a PO change order may have been created.

- *Errors:* The Change Purchase Order process attempted to update the purchase order with the changes from this change request but an error was encountered.

Requisition Change Requests group box

The Requisition Change Requests group box displays the change requests that match your search criteria.

▷	Click the Expand Section icon to display information about each requisition change request, including; the individual requisition lines, the changes made to the original requisition, change reason codes and comments, and any processing errors.
Requisition ID	Click the requisition ID link to access the Requisition Details page (PV_REQ_PO_DTLS) where you can review each line, the purchase order line it was sourced to, and the status of the purchase order.
	See Chapter 12, "Managing Requisitions in PeopleSoft eProcurement," Viewing Requisition Details, page 323.
Purchase Order	Displays the purchase order ID linked to this sourced requisition.
Change Date/Time	Displays the date and time of the changes to the requisition.
Re-Approval Status	Displays the approval status of the changed requisition within the approval workflow framework. The options are pending, denied, approved, or see below (lines do not have the same status).

Change Request Status   Displays the status of the requisition change request. This is the
CHG_PROCESS_STATUS field in the CHNG_RQST_DTL table. Values are:

- *Initialize:* The change request has been added.

- *Ready for Process:* The change request is ready to be picked up by
  PeopleSoft Purchasing.

- *In Process:* The system is currently using this change request to update a
  purchase order and maybe build a PO change order.

- *Complete:* The purchase order has been updated with the changes from this
  change request and a PO change order may have been created.

- *Errors:* The Change Purchase Order process attempted to update the purchase
  order with the changes from this change request but an error was
  encountered.

Processing Error   Displays *Y* if any of the change request lines have processing errors. The message
set, message number, and message are displayed in the Processing Errors tab
under the Expand Section icon. This processing error occurs when the change
request is pick up by the Change Purchase Orders process in PeopleSoft
Purchasing.

Processing Change Requests in PeopleSoft Purchasing

If you have changed an eProcurement requisition that has already been sourced to a purchase order, then a
change request might be created and placed in the PV_CHG_RST_DTL table. When the changed requisition
has completed budget checking and approval workflow, the change request in the PV_CHG_RST_DTL table
is changed from a pending status to an approved status. In addition, the change request is also placed in the
PeopleSoft Purchasing tables; CHNG_RQST and CHNG_RQST_DTL. These tables contain change requests
from many different sources, including; PeopleSoft eProcurement, PeopleSoft Inventory, PeopleSoft
Manufacturing, PeopleSoft Order Management, PeopleSoft Supply Planning, third-party sources, as well as
PeopleSoft Purchasing itself. The Change Purchase Order process in PeopleSoft Purchasing picks up the
change requests and updates the purchase order. For purchase orders that have already been dispatched, a
change order could be created and dispatched to the vendor.

For more information on change request processing in PeopleSoft Purchasing, see the "Creating Purchase
Order Change Orders" chapter in the PeopleSoft Enterprise Purchasing PeopleBook.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Order Change Orders."

PeopleSoft eProcurement contains links to the following PeopleSoft Purchasing pages:

- Approve Change Requests page.

- Change Purchase Orders process.

Pages Used to Process Change Requests in PeopleSoft Purchasing

Page Name	Definition Name	Navigation	Usage
Approve Change Requests	CHNG_ORD_LOOKUP	• eProcurement, Buyer Center, Approve Change Requests • Purchasing, Purchase Orders, Manage Change Orders, Approve Change Requests	Review and approve change requests. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Order Change Orders," Reviewing and Approving Change Requests.
Change Purchase Orders	RUN_PO_POCHNG	• eProcurement, Administer Procurement, Run eProcurement Processes, Procurement Processes, Change Purchase Order • Purchasing, Purchase Orders, Manage Change Orders, Process Change Orders	Select parameters for and run the Change Purchase Order process (PO_POCHNG). See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Order Change Orders," Creating Change Orders from Approved Change Requests.

Chapter 17

Receiving Stock and Returning Items to Vendors

This chapter provides an overview of receiving stock and discusses how to:

*   Receive stock as a casual user.

*   Return items to vendors.

*   Receive stock as a power user.

Understanding Receiving Stock

This section discusses:

*   The common element used in this chapter.

*   Stock receipt.

*   Items received by amount.

*   Receipt notification workflow.

*   Options for receiving stock.

The Common Element Used in This Chapter

Receipt Status   Select from these values:

Open: The receipt is being entered into the system and has not yet been saved, or the receipt has been entered and saved but might be missing required information.

Received: The receipt has been entered and saved.

Hold: A power user has put the receipt on hold.

Moved: The necessary items in the receipt have been successfully passed to PeopleSoft Asset Management, PeopleSoft Inventory, or PeopleSoft Enterprise Manufacturing (if those applications are installed).

Complete: The receipt has finished all steps and is closed.

Cancelled: The receipt was entered and saved, but then canceled. A cancellation cannot be reversed.

Stock Receipt

When you enter a requisition, PeopleSoft eProcurement processes it, places it on a purchase order (PO), and sends (dispatches) it to the vendor. If PeopleSoft Inventory is installed, the requisition might come from the warehouse stock instead of from a vendor. When you receive the requested items, you record the receipt, which enables the buyers to track the quality and promptness of vendors.

The PeopleSoft application assigns a receipt ID to each saved receipt. Because a one-to-one ratio does not exist between POs and receipts—a PO might have multiple receipt IDs due to multiple shipments or a shipment might have multiple POs—this ID is stored separately from the dispatched purchase order or the original requisition. If PeopleSoft Payables is installed, a process matches the receipts to the POs (to confirm that the goods were shipped) before the vendor is paid.

Note. To record a receipt before the accounts payable department can pay the vendor, select *Receiving Required* for the item.

Items Received by Amount

A receipt is usually recorded based on the quantity that is received. However, you can also receive by amount in PeopleSoft eProcurement. This feature is particularly useful if you order and receive services.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments," Receiving Items by Amount

Receipt Notification Workflow

PeopleSoft eProcurement enables requesters to record the receipt of their own goods. Because some requesters do not record their receipts promptly, the workflow process for receipt notification reminds requesters to receive their goods. If PeopleSoft Payables records the voucher (vendor's invoice) for the PO but no receipt is entered, workflow inserts a reminder in the To Do List of the requester.

See Also

Chapter 3, "Determining Technical Implementation Options," Maintaining System Users and Roles, page 37

Options for Receiving Stock

After a PO is dispatched, the vendor ships the stock. When the stock arrives at the location, use the receiving area to record the receipt. PeopleSoft eProcurement offers several options for receiving stock:

Casual user receiving	This is the default setting. Items are delivered directly to a casual user's desk or area without being routed through the central receiving department. For example, a Federal Express shipment is delivered directly to you or an assistant. To enter the receipt, the user opens the original requisition and links to the requisition's PO. The user then records the receipt on a simplified form.
Casual user receiving with edit and cancel privileges	A casual user can also be granted privileges to edit and cancel receipts and to override a vendor's return address. To have these privileges, the casual user's roles must contain a user role that is included under RECV_CASUAL_ALL on the eProcurement Role Actions page.
	When requesters or users are assigned to either the RECV_CASUAL or RECV_CASUAL_ALL role actions, they can only receive against PO lines that they created. For example, if after the original requisition is sourced to a PO and someone else creates a new PO line afterward, the requester won't be able to receive against the newly added PO line. Only if the requester creates the new PO line, either by sourcing a new requisition line to the existing PO or by creating a change request using the Manage Requisitions page, can she subsequently receive against the new PO line.
Receiving by Ship To Location	A casual user can be set up to receive all items shipped to a ship to location specified as the Default Ship To location in the Receiver Setup page.
No receiving privileges	To prevent the casual user from having access to the receiving area of PeopleSoft eProcurement, the roles must contain a user role that is included under NO_CASUAL_RECV on the eProcurement Role Actions page.
Power receiving	A power user is an individual in the receiving department or a purchasing professional who receives items by using the receiving pages in PeopleSoft Purchasing. The power user selects the PO and creates the receipt. The power user can also record a receipt without a PO. To be a power user, the roles must contain a user role that is included under RECV_POWER on the eProcurement Role Actions page.

Receiving Stock As a Casual User

This section discusses how to:

- Select items to receive.

- Add or change a receipt.

- Reject a shipment.

- Add comments at the receipt heading and line levels.

- Review or add asset information to an item.

- Generate tag numbers.

- Generate serial numbers.

- Enter the location for an item.

- View recorded receipts.

Pages Used to Receive Stock As a Casual User

Page Name	Definition Name	Navigation	Usage
Receive Items	PV_PO_PICK_ORDERSC	eProcurement, Receive Items	Select items to receive.
Receive	PV_RECV_WPO	eProcurement, Receive Items Select items to receive, and then click the Receive Selected button.	Add or change a receipt.
Receipt Header Comments	PV_RECV_COMMENTS	Click the Add Header Comments link on the Receive page.	Record one or more comments at the header level of this receipt and add attachments. You cannot access this page unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.

Page Name	Definition Name	Navigation	Usage
Standard Comments	PV_STD_COMM_SEC	• Select the Standard Comments link on the Receipt Header Comments page. • Select the Standard Comments link on the Receipt Line Comments page.	Use this page to apply a standard comment as a comment to the receipt line or receipt header. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components. Enter search criteria of Comment Type, Comment ID, or Description and then click the Search button to display the standard comments. Select a standard comment and click OK to apply the comment to the requisition. See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Setting Up Standard Comments.
Reject Shipment	PV_RECV_REJECT	Click the Reject Shipment link on the Receive page.	Reject a shipment.
Line Details	PV_RECV_WPO_DETAIL	Click the Details button on the Receive page.	View more information about the item, all receipts from this requisition, and the PO that is used.
Receipt Line Comments	PV_RECV_COMMENTS	Click the Receive Comments icon on the Receive page.	Use this page to record the condition of the shipment when it arrived at the location (good, fair, or damaged), add comments about the receipt line, and add attachments to the receipt line. You are limited to one comment and no attachments unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.

Page Name	Definition Name	Navigation	Usage
Asset Management Information	PV_RECV_WPO_AM	Click the Asset Mgmt (asset management) button on the Receive page.	Review or add asset information to an item. **Note.** This page is used only when the item is an asset item.
Generate Tag Numbers	PVRECV_AUTO_SERIAL	Click the Tag Numbers link on the Asset Management Information page.	Generate a sequence of tag numbers that are to be applied to each asset line. **Note.** This page is available only when you are using PeopleSoft Asset Management.
Generate Serial Numbers	PVRECV_AUTO_SERIAL	Click the Serialize link on the Asset Management Information page.	Generate serial numbers. **Note.** This page is available only when you are using PeopleSoft Asset Management.
Inventory Putaway Information	PV_RECV_WPO_PTWY	Click the Putaway Items button on the Receive page.	Enter the location of an item.
Inventory Item Information	PV_RECV_INV_ITEMS	Click the Inventory Item Info link on the Inventory Putaway Information page.	View the inventory information that is defined for this item on the Item Definition page.
Storage Location Search	PV_RECV_STOR_SRCH	Click the Search button on the Inventory Putaway Information page.	Search for a material storage location in PeopleSoft Inventory, where you can put the received items.
Manage Receipts	PV_RECV_UPDATE_REC	Click the Inquire Receipts link on the Receive page.	View recorded receipts. Add details, return items to vendor, or cancel a receipt.

Selecting Items to Receive

Access the Receive Items page (eProcurement, Receive Items).

Receive Items page

For a requisition line to appear on this page, the item must have been placed on a PO and dispatched to the vendor. You can view the requisitions that you entered and those that were purchased for you. When the entire quantity of the item has been received, the requisition line no longer appears on this page.

Requisition Lines to Receive Tab

Receive Selected	Click to receive the requisition lines that you select on this page. The system displays the Receive page, where you can make changes to the receipt quantity, review requisition details, and add comments.
Requisition	Select the check box to the left of the line, and click Receive Selected to display the Receive page.
Item Description	Click to access the Item Description page, where you can review item details and an item image, if it's available.
Total Req Qty/Amt (total requested quantity/amount)	Displays a quantity only if one of the lines was over received and a return to vendor (RTV) was created to return the excess stock. This is the quantity that you expect to receive (the requisition quantity or the overage amount).
Accepted to Date	Displays the number of items that have been accepted to date.
Ship To	Displays the business unit to which the requisition item is going to be shipped.
Attention To	Displays the name of the individual who should receive the items or services on this requisition line. Once the shipment is physically received, this individual should record the receipt, enabling the buyers to track the quality and promptness of the vendor.
Vendor	Displays the vendor who is supplying the item.

Check All	Click this button to select all requisition lines with the same vendor as the first line or as the line you have already selected. One receipt can include only one vendor; therefore, not all displayed lines are selected by this button.
Inquire Receipts and **Manage Return to Vendors**	Click these links to display previously recorded receipts or RTVs for the requisitions. This information verifies that a receipt form or an RTV has been entered for this shipment.

Warning! Do not change the RTV Adjust Sourcing option after transactions have been recorded in PeopleSoft eProcurement. Changing this option may alter the quantities that appear so that they become inconsistent in the PeopleSoft eProcurement receiving and RTV transactions.

Purchase Order Details Tab

Select the Purchase Order Details tab.

PO Qty (purchase order quantity)	Displays the quantity for this PO.
Recv Reqd (receiving required)	Displays *Y* (yes) or *N* (no) to indicate whether the item requires receiving to pay the vendor for the goods. You do not need to enter a receipt for any item that is marked with *N*.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining PeopleSoft Purchasing Business Units and Processing Options," Establishing Purchasing Processing Options

Adding or Changing a Receipt

Access the Receive page (eProcurement, Receive Items; Select items to receive, and then click the Receive Selected button).

Receive page

Add a new receipt of one or more PO lines and reject and inspect received quantities. Before creating a receipt, verify that the PO was dispatched.

Receipt No (receipt number) or **New Receipt**	Displays the receipt ID that was assigned when the receipt was entered. If you are adding a new receipt, the words *New Receipt* appear until the page is saved. Then a receipt ID is assigned automatically.
Received Date	Enter the date that the shipment arrived. The default is today's date, but you can change it if the shipment arrived earlier.
Add Header Comments	Select to access the Receipt Header Comments page, where you can record one or more comments at the header-level of this receipt and add attachments. This link is not visible unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
Reject Shipment	Click to access the Reject Shipment page, where you can reject some or all of the items that are sent to you.
Item Description	Click this link to view a detailed description and picture (if available) of the item.
Received Qty (received quantity)	Enter the quantity of the items that you received.
Clone Quantity	Click the Clone Quantity button to copy the received quantity from one line to all other lines on this form. This button saves data entry steps when you have many line items.
UOM (unit of measure)	Select the type of unit by which the item was shipped to you, for example, by box, each, and so on.

Accept Qty (accept quantity)	Displays the number of items that you are accepting. If you do not reject any items by clicking the Reject Shipment link and entering the quantity that you are rejecting on the Reject Shipment page, the system assumes that you are accepting all of the items that you received. If you rejected any items, the system automatically calculates the accepted quantity when you click OK.
▤	Click the Details button to access the Line Details page, where you can view more data about the item, the PO that you are receiving, and the previous and current receipts.
💬 (Receive Comments icon)	Select this icon to access the Receipt Line Comments page, where you can record the condition of the shipment when it arrived at the location (good, fair, or damaged), add comments about the receipt line, and add attachments to the receipt line. You are limited to one comment and no attachments unless your user ID is linked to the eProcurement role action of MULTI_COMMENTS.
💬 (PO Comments icon)	Select this icon to view comments added on the purchase order at the header-level, line-level, or ship to level. To appear here, the purchase order comments must have been marked with the Show at Receipt check box.
Asset Management	Click to access the Asset Management Information page, where you can view or change the fixed asset information, such as serial ID and asset profile ID. This button appears only if the item is designated as a fixed asset for PeopleSoft Asset Management.
Putaway Items	Click to access the Inventory Putaway Information page, where you can view or change the inventory information, such as serial ID and warehouse location. This button appears only if the item is designated as a PeopleSoft Inventory item.
▤	Click the Device Tracking button to access the Device Tracking page.
Inquire Return to Vendors	Click to access the Manage Return to Vendors page, where you can view a list of vendors from which you have canceled orders, closed orders, open orders, or shipped orders.
Inquire Receipts	Click to access the Manage Receipts page, where you can view a list of requisitions, receipt numbers, received date, PO IDs, received quantity, and status of receipts.

See Also

PeopleSoft Enterprise Managing Items 9.1 PeopleBook, "Working with Items," Using Device Tracking

PeopleSoft Enterprise Inventory 9.1 PeopleBook, "Receiving and Putting Away Stock"

Rejecting a Shipment

Access the Reject Shipment page (Click the Reject Shipment link on the Receive page).

Reject Shipment page

Reject some or all of the items that you are recording in this receipt by entering information about each item that you are rejecting.

Reject Qty (reject quantity)	Enter the quantity of the item that you are rejecting. This can be all or part of the quantity that was delivered to you (the received quantity). When you enter a quantity and move out of the field, the remaining fields on this page are available for entry.
Reject Reason	Select the reason why you are rejecting the items.
Reject Action	Select how you want the vendor to correct the mistake. This is an information field; to return stock to the vendor, use the Return to Vendor page.
RMA Number (return material authorization number) and **RMA Line** (return material authorization line)	Enter the return material authorization number and line number that the vendor provided

Adding Comments at the Receipt Header and Line Levels

The Receipt Header Comments page and the Receipt Line Comments page use the same fields. Navigation is different and each page adds comments and attachments to a different part of the receipt.

Access the Receipt Header Comments page (click the Add Header Comments link on the Receive page) or access the Receipt Line Comments page (click the Receive Comments icon on the Receive page).

Receipt Header Comments page

Receipt Line Comments page

Condition	(Receipt Line Comment page only) Select the general condition of the shipment; the options are Good,Fair, and Damaged.
![+] (Add a New Row icon)	Select to add a new comment field. Comments are numbered as you add them.
Use Standard Comments	Click to access the Standard Comments page (PV_STD_COMM_SEC), where you can select a standard comment to be applied as a comment to this receipt. Standard comments are frequently used comments that have been defined in the system using the Standard Comments (STANDARD_COMMENTS) and Standard Comment Type (STD_COMMENT_TYPE) components.
	See *PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook*, "Defining Procurement Options," Setting Up Standard Comments.
![spellcheck] (Spell Check Comment icon)	Click to perform a spell check on the comment.

Add Attachments	Click to access the File Attachments window, where you can browse and select a file to be attached to this comment. Only one file can be attached to each comment. Once a file is attached, the Attachment group box displays the file details including file name, the user who attached it, and the date and time it was attached. The Send Vendor check box applies to each file separately.
Show at Voucher	Select if you want this comment to appear on the voucher.
OK	Select to return to the Receive page with the comments and attachments that you have added on this page.
Cancel	Select to return to the Receive page without saving the changes that were added to this page.

Reviewing or Adding Asset Information to an Item

Access the Asset Management Information page (Click the Asset Mgmt (asset management) button on the Receive page).

Tag Numbers	Click to access the Generate Tag Numbers page, where you can generate asset tag numbers. The quantity on the distribution must be 1 to enter a tag number. This information becomes available on the Asset Information page after the asset data has been passed on to asset management.
Serialize	Click to access the Generate Serial Numbers page, where you can generate serial numbers.
Insert Non-Serial Row	Click to distribute nonserialized item rows to different asset management custodians and locations. This generates another asset row for the same asset management (AM) unit. If you split the AM quantity, you must reduce the earlier AM quantities for this unit. The total AM quantity for this unit must match the total quantity that you've accepted. When an item is inventory-related, you can't split a quantity of one for a serialized row.
Next Asset ID	Click to assign a temporary value of *AUTO-ASSIGN* as the line item's asset ID value. This value is replaced with the next available asset ID value when you save the receipt.
AM Unit (asset management unit)	Displays the PeopleSoft Asset Management business unit, where the item is capitalized.
CAP Sequence (capital acquisition planning sequence)	Displays the sequence number for the capital acquisition plan.

Cost Type	Enter the cost type code for the receipt item if applicable. Cost types represent different components of the cost of an asset, such as materials, labor, and overhead. For example, you can differentiate between the cost of building an asset and its market value by allocating the cost of production to one cost type and the margin of profit to another cost type.
	Cost type, combined with the asset category and transaction code, determines the general ledger accounts into which the costs are entered.
Sel (select)	Select to display the Insert Non-Serial Row button if you want to distribute nonserialized item rows to different asset management custodians and locations.
Seq (sequence)	Displays the receiving distribution sequence number that is associated with the selected asset row.
Quantity	Enter the item quantity that is being distributed on the selected distribution sequence.
✖	Click the Cancel Row button to cancel this asset schedule information. If the receipt has not been interfaced, this asset row is not interfaced and is deleted during receipt interface processing. If the receipt is interfaced, a retire asset transaction is passed to PeopleSoft Asset Management.

See Also

PeopleSoft Enterprise Asset Management 9.1 PeopleBook, "Adding and Maintaining Assets"

Generating Tag Numbers

Access the Generate Tag Numbers page (Click the Tag Numbers link on the Asset Management Information page).

Note. The Multiplier algorithm uses the first number sequence from the right end of the start number to use as the number to increment. For example, NB-8000-001-ABC would use 001 as the first number sequence, not 8000.

Overwrite existing numbers	Select to overwrite existing tag number information from the Asset Management Information page with the values that you have entered on this page.

Generating Serial Numbers

Access the Generate Serial Numbers page (Click the Serialize link on the Asset Management Information page).

Use this page to generate a sequence of serial IDs that are to be applied to each item.

The fields on this page are the same as the fields on the Generate Tag Numbers page, except that they are for serial numbers.

Entering the Location for an Item

Access the Inventory Putaway Information page (Click the Putaway Items button on the Receive page).

Enter or review the location in PeopleSoft Inventory where this item will be placed; record serial and lot IDs. If the item that you are receiving was marked as a PeopleSoft Inventory item (and PeopleSoft Inventory is installed), use this page to record the information that is required to put the item in inventory. The default information appears from the item definition. Change this information only if you are storing the item in a different inventory location.

Status	Displays the receipt shipping status. The status can be *Open, Received, Closed, Canceled,* or *Hold.* If the status is *Open* or *Received,* then you can change the inventory distribution information on this page.
Lot IDs	Click to access the Generate Lot ID page, where you can generate lot numbers. This link appears only if the item is lot-controlled.
Serial IDs	Click to access the Generate Serial Numbers page, where you can generate serial numbers. This link appears only if the item is serial-controlled.
Insert Non-Serial Row	Click to split out nonserialized item row quantities to different putaway locations. This generates another putaway row for the same PeopleSoft Inventory business unit. You must reduce the earlier putaway quantities for this unit if you split a putaway. The total putaway quantity for this unit must match the total quantity that you've accepted. When an item is inventory-related, you cannot split a quantity of one for a serialized row.
Distribution Line Number	Displays the distribution line number. The distribution level of the purchase order records the internal location where the stock is to be delivered.
Consigned	Select if the stock is defined as consigned goods. The costs of consigned goods are not recorded until the item is used or shipped.
Non-Owned Item	Select if the stock is defined as not owned. The costs of nonowned goods are not recorded unless they are also marked as consigned goods.
Location Code	Displays the delivery location within the shipment address to which this stock should go.

You can view and change item information and location in the inventory warehouse.

Sel (select)	Select to display the Insert Non-Serial Row button if you need to insert a nonserial row number for this row.
Quantity	Enter the quantity for this row. The total of all the rows must equal the accept quantity on the Receipt form.
Expire Dte (expire date)	Displays the date that the stock expires. The default date is based on the item definition; you can change it.

Area	Displays the storage area of the inventory warehouse where this item will be stored. The default information here is based on the item defaults. You can change the value.
Search	Click the Search button to access a search page, where you can select the material storage location for the item in the inventory warehouse.
Lev 1, Lev 2, Lev 3, Lev 4 (level 1, level 2, level 3, level 4)	Displays the levels of the inventory warehouse (subdivisions of the Area field) in which this item will be stored. The default information is based on the item defaults. You can change the value. If PeopleSoft Inventory does not use this field, it may be blank.
Container	Enter the container ID if the inventory system uses container management (license plating). This ID can also be assigned later in PeopleSoft Inventory.

See Also

PeopleSoft Enterprise Inventory 9.1 PeopleBook, "Receiving and Putting Away Stock"

PeopleSoft Enterprise Inventory 9.1 PeopleBook, "Managing Consigned Purchases Inventory"

PeopleSoft Enterprise Inventory 9.1 PeopleBook, "Structuring Inventory," Defining and Maintaining Material Storage Locations

Viewing Recorded Receipts

Access the Manage Receipts page (Click the Inquire Receipts link on the Receive page).

Manage Receipts page

The maximum number of rows that are retrieved and that appear on this page can be defined on the eProcurement Installation Options page. If the search returns more than the defined number of rows, an error message appears.

Show Status   Select to view receipts with these statuses:

- *All:* Receipts of any status.

- *Closed/Cancelled:* Receipts that have been closed or canceled.

- *Closed:* Receipts have been completed. No further processing is required.

- *Moved:* Receipts that have been entered, have passed all edits, and have been sent to PeopleSoft Inventory or Asset Management.

- *Received/Open:* Receipts with the status *Open* or *Received.* This is the default status.

Requisition Name   Search by the name of a specific requisition. The requisition name is the name that the requester assigned when creating the requisition. If a name was not assigned, the system uses the requisition ID as the name. This limits the search results to one specific requisition.

                                         Click the Details button to access the Receive page, where you can view and change this receipt.

                                         Click the RTV Setup button to access the Select Receipts to Return page, where you can enter the information that is needed to return the items to the vendor. If this button is unavailable, the item is a PeopleSoft Inventory or Asset Management item, and you must *Move* the status of the receipt before you can enter an RTV.

                                         Click the Cancel button to access the Cancel Receipt page, where you can view a list of the items on the receipt and then either choose to cancel the receipt or return to the Manage Receipts page.

See Also

Returning Items to Vendors

Several business reasons exist for initiating a vendor return. You might receive defective materials, too many items, items that were shipped in error, or items that you no longer require. When you decide to return goods to the vendor, you must enter an RTV.

This section discusses how to:

- Initiate a vendor return.

- View and change the vendor's ship-to address.

- View recorded RTV entries.

Pages Used to Return Items to Vendors

Page Name	*Definition Name*	*Navigation*	*Usage*
Return To Vendor	PV_RTV	eProcurement, Receive Items Select the Inquire Receipts link. Click the RTV icon. Click the Return to Vendor button at the top of the Select Receipts to Return page.	Initiate a vendor return.
Item Detail	PV_RTV_RECVDS_DISP PV_RTV_ASSET_DISP PV_RTV_PO_DS_DISP	Click the RTV Details button on the Return to Vendor page.	View information about a requisition, an item, and previous returns.
RTV Fees (Return to Vendor Fees)	PV_RTV_LN_FEE	Click the Return to Vendor Fees button on the Return to Vendor page.	Record fees that are incurred for returning items to the vendor, including restocking fees and other charges.
Vendor Address	PV_RTV_ADDR_DTL	Click the Vendor link on the Return to Vendor page.	View or change the vendor's ship-to address for this return. Use this page if the vendor has a return address that is different from the ordering address.
Manage Return to Vendors	PV_RTV_UPDATE_REQ	Click the Inquire Return to Vendors link on the Return to Vendor page.	View RTV entries that have been recorded under the user ID.

Initiating a Vendor Return

Access the Return To Vendor page (eProcurement, Receive Items. Select the Inquire Receipts link. Click the RTV icon. Click the Return to Vendor button at the top of the Select Receipts to Return page).

Return To Vendor page

You can change the text that appears on this page by using the setup instructions for the Return to Vendor page.

Action	Select a reject action for the returned merchandise. The selection determines the selections for the other options on this page. Values are:
	Credit (return for credit): The goods are to be returned to the vendor, and no replacement of these returned goods is requisitioned.
	Exchange (return for exchange): You are returning the item, and you want a different item to be sent to you. This option triggers a PeopleSoft Workflow event to a buyer.
	Replace (return for replacement): The returned materials will be received against the original purchase order again, after the vendor ships replacement goods for the returned items.
	Click the RTV Details button to access the Item Detail page, where you can view information about this requisition and previous returns.
	Click the Return To Vendor Fees button to access the RTV Fees page, where you can enter miscellaneous charges, such as restocking fees.
Ship RTV(Ship Return To Vendor)	Click if you have shipped all the items on this page. This option sets the shipped quantity on the RTV to equal the return quantity and changes the RTV status to *Shipped.* The RTV status must be *Shipped* before you run the RTV Reconciliation process.

Ship Via   Select the method of shipment that you are using to ship the stock back to the vendor.

Vendor   Click to go to the Vendor Address page.

Viewing and Changing the Vendor's Ship To Address

Access the Vendor Address page (Click the Vendor link on the Return To Vendor page).

Vendor Address page

Note. For you to change the address, the roles must contain a user role that is included under RECV_CASUAL_ALL on the eProcurement Role Actions page.

Return to Vendor, Location, and **Contact**   Displays the default information from the vendor definition; you cannot change this information here.

Viewing Recorded RTV Entries

Access the Manage Return to Vendors page (Click the Manage Return to Vendors link on the Return To Vendor page).

Manage Return to Vendors page

Status	Displays the status of the RTV:
	Open: The RTV form has been entered and saved.
	Shipped: All lines on the return have been shipped. An RTV line item is considered shipped when the line's shipped quantity equals the return quantity.
	Closed: All lines on the return are complete. After a return is closed, you cannot change it.
	Cancelled: The RTV has been canceled. You cannot change the RTV status to *Cancelled* if all items on the RTV have been shipped.
🖉	Click the Display RTV Information button to access the Return to Vendor page, where you can view the information about the original RTV form. If the RTV form status is *Open,* you can change the information.

Receiving Stock As a Power User

In PeopleSoft eProcurement receiving, a power user can perform more actions than a casual user. A power user has access to many PeopleSoft Purchasing pages that are designed for receiving department personnel.

This section lists the pages used to receive stock as a power user and discusses how to view recorded receipts.

Pages Used to Receive Stock As a Power User

Page Name	Definition Name	Navigation	Usage
eProcurement Role Actions	PV_ACTIONS	eProcurement, Administer Procurement, Maintain Users and Roles, eProcurement Role Action	Associate necessary roles with the eProcurement role action *RECV_POWER.*
Manage Receipts	PV_RECV_UPDATE	eProcurement, Receive Items	View recorded receipts.
Process Receipts	PV_RECV_PROCESS	eProcurement, Receive Items Click the Process Receipts link.	Choose how to process receipts.
Selected Receipt	PO_PICK_ORDERS	eProcurement, Receive Items Click the Inspection link.	Select purchase orders that require inspection.
Advanced Shipment Receipts	RECV_AOLN_EC	eProcurement, Receive Items Click the Review ASN Receipt link.	Review advanced shipment receipt notifications.
Manage Return to Vendors	PV_RTV_UPDATE	eProcurement, Receive Items Click the Inquire Return to Vendor link.	View RTV information, add an RTV, and reconcile an RTV.
Maintain Return To Vendor- Return To Vendor	RTV	Click the Add RTV link on the Manage Return to Vendors page.	Enter RTV details, such as return quantities and source information.
Reconcile RTVs (Reconcile Return To Vendor)	RUN_POC5000	Click the Reconcile RTV link on the Manage Return to Vendors page.	Run the RTV Reconcile process.

Page Name	Definition Name	Navigation	Usage
Select Purchase Orders	PO_PICK_ORDERS	eProcurement, Receive Items Click the Add New Receipt link.	Select POs that require a receipt. Add a new receipt of one or more PO lines; reject and inspect received quantities. Before creating a receipt, verify that the PO was dispatched.
Maintain Activity and Comments page	RECV_ACTIVITY	Click the Activities icon on the Manage Receipts page.	Record comments about the receipt.
Delivery Location	RECV_DELIVERY1	Click the Delivery Information icon on the Manage Receipts page.	Record delivery locations.
Location Comments	RECV_DELIVERY2	Click the Delivery Information icon on the Manage Receipts page. Select the Location Comments tab.	Record location comments.
Ship To Comments	RECV_DELIVERY3	Click the Delivery Informationicon on the Manage Receipts page. Select the Ship To Comments tab.	Record ship to comments for the receipt.
Maintain ChartFields	RECV_ACCOUNT	Click the ChartFields icon on the Manage Receipts page.	View the current ChartFields to be used to record this receipt. You can use this page to change the way the shipment is charged to the accounting records.
Close Landed Costs	CM_LC_MANU_CLOSE	Click the Manual Close Landed Cost icon on the Manage Receipts page.	View the landed costs associated with this receipt.

Viewing Recorded Receipts

Access the Manage Receipts page (eProcurement, Receive Items).

Manage Receipts page

You can view previously recorded receipts, add new receipts, or update details, comments, delivery information, and ChartField information. The receipt list displays all receipts that have been created for a user ID. Each row represents a separate line of the receipt so that you can see each item that has been received. If more than one item was received on the same receipt number, the same receipt number appears in multiple rows.

The roles must contain a user role that is included under RECV_POWER on the eProcurement Role Actions page.

Business Unit	Enter the PeopleSoft eProcurement business unit that was used to enter the receipts that you want to appear.
PO Unit (purchase order business unit)	Enter the Purchasing business unit that was used to enter the receipts that you want to appear.
Add New Receipt	Click to access the Select Purchase Order page in PeopleSoft Purchasing, where you can select the PO to receive.
Process Receipts	Click to access the Process Receipts page where you can access the receiving process in PeopleSoft Purchasing.
Inspection	Click to record inspection results. Some items require a separate inspection step. If you receive one of these items, click this link to access the Select Receipt page in PeopleSoft Purchasing, where you can find the receipt and record the results of the inspection.

Review ASN Receipt (review advanced shipment notification receipt)	Click to access the Advanced Shipment Receipts page in PeopleSoft Purchasing where you can review the receipts that were created by the Advanced Shipment Notification (ASN). The receipt might be the ASN, which is sent by the vendor.
Manage Return To Vendors	Click to access the Manage Return to Vendors page, where you can view the current RTV records.
Details	Click the Details icon to access the Receiving page in PeopleSoft Purchasing, where you can view and change this receipt.
Activities	Click the Activities icon to access the Maintain Activity and Comments page for receipts, where you can review or change comments about the receipt.
Delivery Information	Click the Delivery Information icon to access the Delivery Location page in PeopleSoft Purchasing. Here you can review and enter receiving information related to shipping details, such as carrier and packing slip ID.
ChartFields	Click the ChartFields icon to access the Maintain ChartFields page for receipts in PeopleSoft Purchasing, where you can view the accounting entries made at the time of receipt. The chart of the accounts that are used to record this receipt appears; for example, expense and inventory stock.
Manual Close Landed Cost	Click the Manual Close Landed Cost icon to access the Close Landed Costs page in PeopleSoft Purchasing, where you can manually close receiver line charges.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments"

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments," Working with Landed Costs on Receipts

Delivered Workflows for PeopleSoft eProcurement

This appendix discusses delivered workflows using the PeopleTools Workflow Technology for PeopleSoft eProcurement.

This appendix does not include approval workflows using the PeopleSoft Approval Framework.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology

Enterprise PeopleTools 8.50 PeopleBook: Using PeopleSoft Applications

PeopleSoft Enterprise Approval Framework 9.1 PeopleBook

Delivered Workflows for PeopleSoft eProcurement

This section discusses PeopleSoft eProcurement workflow. The workflows are listed alphabetically by workflow name.

Change Request Approval

This section discusses the Change Request Approval workflow.

Description

Event	A requester submits a change request that involves an increase in the scheduled quantity, price, or both. The requisition is submitted with changed values. **Note.** This approval workflow requires that you use the Maintain Workflow feature to set up roles and steps for use with the approval process.
Action	The system routes the change request to an approver for approval or denial.

Notification Method	Email and Worklist.
Email Template	Req Change Rqst Approval Rting.

Change Request Approved

This section discusses the Change Request Approved workflow.

Description

Event	An approver approves the change request.
Workflow Action	The system marks the change request as approved and routes it to a buyer for approval or denial.
Notification Method	Email and Worklist.
Email Template	Req chng rqst approved.

Change Request Buyer Approval

This section discusses the Change Request Buyer Approval workflow.

Description

Event	A requester submits a change request that does not involve a change in the scheduled quantity or price. The requisition is submitted with changed values.
Action	The system triggers the PV_PO_CHNG_REQST and using the change request notification activity PV_CHNG_APPRV to send the change request for approval or denial.
Notification Method	Worklist.

Change Request Denied

This section discusses the Change Request Denied process.

Description

Event	An approver denies the change request.
Action	The system marks the change request as denied, ending the workflow process.

Notification Method	Email and Worklist.
Email Template	Req Chng Reqst denied.

eProcurement New Item Request

This section discusses the eProcurement New Item Request process.

The eProcurement New Item Request process has two components:

• Request a new item.

• Respond to a new item request.

Requesting a New Item

Event	A requester who creates an requisition submits a New Item Request by using the Special Request - Special Item page.
Action	The system changes the New Item Request - Status to *Pending*. The system creates a worklist entry for all users who have *Item Notification* role action.
Notification Method	Worklist

Responding to a New Item Request

Event	A user who has the Item Notification role action approves or denies the new item request by using the eProcurement New Item Request page.
Action	The system sends an email to the requester who requested the new item. If the item is approved, the email includes the SetID and the Item ID. The system updates the New Item Request - Status field on the Special Request - Special Item page. If the new item request is approved, the status is changed to *Created* and the SetID and Item ID fields appear. If the new item request is denied, the status is changed to *Denied.*
Notification Method	Email
Email Template	New Item Created and New Item Denied

Procurement Card Request Workflow

Use the Request Procurement Card page to request procurement cards for PeopleSoft eProcurement. After you enter information and save the page, workflow routes the procurement card to the correct authority for approval.

Note. There is no set up needed for PeopleSoft eProcurement's procurement card request workflow process.

When using PeopleSoft Workflow to approve procurement card requests:

1. A requester who wants a procurement card fills out the Request Procurement Card page.

2. After the page is saved, a workflow event triggers the PV_CC_REQUEST business process.

3. PeopleSoft Workflow inserts a Worklist item in the To Do List of the user assigned on the User Profile - Roles page to the workflow role of administrator.

4. When the administrator selects the Worklist entry on the To Do List, the Employee Profile - Card Data page opens.

5. The administrator can add additional information and save (or cancel) the profile.

Requisition Approval

This section discusses the Requisition Approval process.

Description

Event	A requester submits a requisition, or submits and approves a requisition if self approval is in place.
Action	The system routes the requisition for further approval, if necessary.
Notification Method	Email and Worklist.
Email Template	Requisition Approval.

Requisition Approval Error

This section discusses the Requisition Approval Error process.

Description

Event	An approval workflow error occurred in the approval routing. This can occur as a result of the approval process configuration or because of approval rules or criteria violations.
Action	The system routes the requisition to the administrator for resolution.
Notification Method	Email and Worklist.
Email Template	Requisition Approval Error.

Requisition Approved

This section discusses the Requisition Approved process.

Description

Event	The requester approves the requisition and no further approvals are required.
Workflow Action	The system marks the requisition as approved.
Notification Method	Email.
Email Template	Requisition Approved.

Requisition Denied

This section discusses the Requisition Denied process.

Description

Event	An approver denies the requisition header.
Action	The system marked the requisition as denied, and stops the workflow process.
Notification Method	Email.
Email Template	Requisition Denied.

Requisition Escalation

This section discusses the Requisition Escalation process.

Description

Event	An approver has not responded to a requisition within the allotted time.
Action	The system notifies the approver and the approver's supervisor and routes the requisition to the step.
Notification Method	Email and Worklist.
Email Template	Requisition Escalation.

Requisition Line Approval

This section discusses the Requisition Line Approval process.

Description

Event	A requester submits a requisition for approval, or an approver approves the requisition line.
Action	The requisition line is routed for further approval.
Notification Method	Email and Worklist.
Email Template	Requisition Line Approval.

Requisition Line Approved

This section discusses the Requisition Line Approved process.

Description

Event	A requester or approver approves a requisition line and no further approvals are required.
Action	The system marks the requisition line as approved.
Notification Method	Email.
Email Template	Requisition Line Approved.

Requisition Line Denied

This section discusses the Requisition Line Denied process.

Description

Event	An approver denies a requisition line.
Action	The system marks the requisition line as denied.
Notification Method	Email.
Email Template	Requisition Line Denied.

Requisition Line Review

This section discusses the Requisition Line Review process.

Description

Event	A user submits a requisition line for approval or approves the requisition line.
Action	The system routes the requisition to a reviewer.
Notification Method	Email and Worklist.
Email Template	Requisition Line Review.

Requisition Review

This section discusses the Requisition Review process.

Description

Event	The requisition header is submitted for approval or is approved by requester and is routed to a user defined as a reviewer.
Action	The system routes the requisition to a reviewer.
Notification Method	Email and Worklist.
Email Template	Requisition Review.

Return to Vendor Exchange Notification Workflow

The Return to Vendor (RTV) Exchange workflow process (PV_RTV_EXCHANGE) delivered with PeopleSoft eProcurement lets goods be returned to vendors and exchanged for other items. The RTV process ensures that an exchange is completed properly by notifying the buyer that it has been entered.

Note. No setup is needed for the PeopleSoft eProcurement RTV Exchange workflow process.

When using Return to Vendor Exchange Workflow to notify buyers:

1. A requester who wants to exchange an item completes an RTV and selects *Exchange*.

2. When the RTV is saved, a workflow event triggers the PV_RTV_EXCHANGE business process. (This event is only triggered if the RTV action is *Exchange.*)

3. PeopleSoft Workflow retrieves the purchase order business unit, purchase order ID, and buyer ID from the RTV

4. PeopleSoft Workflow inserts a Worklist item in the buyer's To Do List.

5. The buyer selects the Worklist entry, opening the PO.

6. The buyer can make modifications or add another PO to record the exchange.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Workflow Technology

Appendix B

PeopleSoft eProcurement Reports

This appendix provides:

- A summary table listing all PeopleSoft eProcurement reports.

- Detailed information for individual reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with the documentation.

PeopleSoft eProcurement Reports: General Description

This table lists the PeopleSoft eProcurement reports, sorted alphanumerically by report ID. The reports listed are Crystal reports. If you need more information about a report, refer to the report details at the end of this appendix.

Report ID and Report Name	Description	Navigation	Run Control Page
APY1090 Matching Exceptions Report	Lists the match exceptions with voucher data, purchase order data, receiver data, and match error information.	eProcurement, Reports Click the Match Exceptions link to access the Match Exceptions page.	RUN_APY1090
APY3000 Vendor Detail Listing Report	Lists vendors by status along with their associated detail data including address information and payment options.	eProcurement, Reports Click the Vendor Detail Listing link to access the Vendor Detail Listing page.	RUN_APY3000
APY3001 Vendor Summary Listing Report	Lists the vendors by status along with basic summary information.	eProcurement, Reports Click the Vendor Summary Listing link to access the Vendor Summary Listing page.	RUN_APY3001

Report ID and Report Name	Description	Navigation	Run Control Page
POY1100 Requisition to PO XREF Report	Provides information about selected requisitions and the purchase orders that were created from them.	eProcurement, Reports Click the Requisition to PO Xref link to access the Requisition to PO XREF page.	RUN_POY1100
POY4006 Expediting Report by Buyer	Provides purchase order details such as late days and due date sorted by buyer. Use it to help determine which purchase orders may require expediting. (Crystal)	eProcurement, Reports Click the Expedite Report link to access the Expediting Report page.	RUN_POY4005
POY4007 Expediting Report by Vendor	Provides purchase order details such as late days and due date sorted by vendor. Use it to help determine which purchase orders may require expediting. (Crystal)	eProcurement, Reports Click the Expedite Report link to access the Expediting Report page.	RUN_POY4005
POY4008 Expediting Report by Due Date	Provides purchase order details such as late days and due date sorted by due date. Use it to help determine which purchase orders may require expediting. (Crystal)	eProcurement, Reports Click the Expedite Report link to access the Expediting Report page.	RUN_POY4005
POY4010 PO Listing by PO Date	Provides purchase order information sorted by purchase order date. (Crystal)	eProcurement, Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010
POY4011 PO Listing By Vendor	Provides purchase order information sorted by vendor. (Crystal)	eProcurement, Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010
POY4012 PO Listing By Buyer	Provides purchase order information sorted by buyer. (Crystal)	eProcurement, Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010
POY4013 PO Listing By Status	Provides purchase order information sorted by status. (Crystal)	eProcurement, Reports Click the PO Listing Report link to access the PO Listings page.	RUN_POY4010

Report ID and Report Name	Description	Navigation	Run Control Page
POY4020 Order Status By Vendor	Provides purchase order status information sorted by vendor. (Crystal)	eProcurement, Reports Click the PO Status Listing to access the PO Status Listing page.	RUN_POY4020
POY4021 Order Status by Item	Provides purchase order status information sorted by item. (Crystal)	eProcurement, Reports Click the PO Status Listing to access the PO Status Listing page.	RUN_POY4020
POY4030 PO Detail Listing By PO Date	Provides detailed purchase order information sorted by purchase order date. (Crystal)	eProcurement, Reports Click the PO Details Listing to access the PO Details Listing page.	RUN_POY4030
POY4031 PO Detail Listing By Vendor	Provides detailed purchase order information sorted by vendor. (Crystal)	eProcurement, Reports Click the PO Details Listing to access the PO Details Listing page.	RUN_POY4030
POY4032 PO Detail Listing By Buyer	Provides detailed purchase order information sorted by buyer. (Crystal)	eProcurement, Reports Click the PO Details Listing to access the PO Details Listing page.	RUN_POY4030
POY4040 PO Schedule Listing By PO Date	Provides purchase order schedule information such as ship to and due date sorted by purchase order date. (Crystal)	eProcurement, Reports Click the PO Schedules Listing to access the PO Schedules Listing page.	RUN_POY4040
POY4041 PO Schedule Listing By Vendor	Provides purchase order schedule information such as ship to and due date sorted by vendor. (Crystal)	eProcurement, Reports Click the PO Schedules Listing to access the PO Schedules Listing page.	RUN_POY4040
POY4042 PO Schedule Listing By Buyer	Provides purchase order schedule information such as ship to and due date sorted by buyer. (Crystal)	eProcurement, Reports Click the PO Schedules Listing to access the PO Schedules Listing page.	RUN_POY4040
POY4100 PO to Requisition XREF Report	Provides information about selected purchase orders and the requisitions that they were created from.	eProcurement, Reports Click the PO to Requisition Xref link to access the PO to Requisition Xref page.	RUN_POY4100

Report ID and Report Name	Description	Navigation	Run Control Page
POY5001 Receiver Summary Report	Provides a summary listing of receipts within a specified date range.	eProcurement, Reports Click the Receipt Summary link to access the Receiver Summary page.	RUN_POY5001
POY5010 Receiver Ship To Detail Report	Provides a summary listing of receipts shipments within a specified date range.	eProcurement, Reports Click the Receipt Ship To Detail link to access the Receiver Ship To Detail page.	RUN_POY5101
POY5020 Receiver Account Detail Report	Provides a summary listing of receipts with account distribution.	eProcurement, Reports Click the Receipt Account Details link to access the Receiver Account Detail page.	RUN_POY5020
POY5050 Return to Vendor Detail Report	Provides the vendor's return address, shipping method, and line item return information.	eProcurement, Reports Click the RTV Details link to access the RTV Details page.	RUN_POY5050
POY5060 RTV Credits (return to details credit)	Provides RTV details, sorted by vendor and RTV ID, and lists the buyer, line details, and the distribution information selected on the return.	eProcurement, Reports Click the RTV Credits link to access the RTV Credits page.	RUN_POY5060
PVY1000 Requisition Costing Summary	Provides information about the accounting distribution for each requisition. For each requisition, the accounting distribution lines are summarized by GL (general ledger) business unit, account, and department. This report also lists the requisition name, requester, amount, and date.	eProcurement, Reports Click the Requisition Costing Summary link to access the Requisition Costing Summary page.	RUN_PVY1000
PVY1100 Requisition Cost Distribution Detail	Provides information about the accounting distribution for each requisition down to the distribution level. By requisition distribution line, each accounting distribution is listed, including GL business unit, account, department, and amount.	eProcurement, Reports Click the Requisition Cost Distribution Details link to access the Requisition Cost Distribution Details page.	RUN_PVY1100

Report ID and Report Name	Description	Navigation	Run Control Page
PVY2000 Catalog Item Usage	Provides information about the items ordered on requisitions. Sorted by business unit and item catalog, this report lists the items ordered and other information, including quantity ordered, average price, currency, and number of requisitions ordering this item.	eProcurement, Reports Click the Category Item Usage link to access the Category Item Usage page.	RUN_PVY2000
PVY4000 PO Item Category Usage	Provides information about the items ordered for the purchase orders within one business unit and one item catalog. This report lists the total quantity ordered of each item and other information, including item ID, item description, item category description, category code, vendor ID, vendor name, contract ID (if any), average price, total amount, currency, and percentage of total. This report is sorted by catalog ID and category code.	eProcurement, Reports Click the PO Items Category link to access the PO Items Category page.	RUN_PVY4000
PVY4001 PO Item Cat Usage by Vendor	Provides information about the items ordered for the purchase orders within one business unit and one item catalog. This report lists the total quantity ordered of each item and other information, including item ID, item description, item category description, category code, vendor ID, vendor name, contract ID (if any), average price, total amount, currency, and percentage of total. This report is sorted by vendor ID.	eProcurement, Reports Click the PO Items Category link to access the PO Items Category page.	RUN_PVY4000

PeopleSoft eProcurement Selected Reports: A to Z

This section provides detailed information about individual reports, including important fields and tables accessed. The reports are listed alphanumerically by report ID.

Common Elements Used in This Appendix

From Date and Through Date   Enter the dates to provide the date range for the requisitions that you want to include in the report. If you leave these fields blank, all requisitions are included regardless of their dates.

SetID   Enter the TableSet ID of the items that you want to include on the report. A setID is required for this report.

PVY2000 - Catalog Item Usage Report

Tree Name   Enter the name of the item catalog (PeopleSoft tree) that you want to include in the report.

PVY 4000 - PO Item Category Usage Report

Catalog ID   Enter the name of the item catalog (PeopleSoft tree) that you want to include on the report. A catalog ID is required for this report.

Tree Node   Enter the name of the PeopleSoft tree node to limit this report to items from this node.

Vendor ID   Enter a vendor ID if you want to limit this report to the purchase orders generated for this vendor.

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