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PeopleSoft Catalog Management for Financials, ESA, and SCM 9.1 PeopleBook

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PeopleSoft Catalog Management for Financials, ESA, and SCM 9.1 PeopleBook
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PeopleSoft Catalog Management Preface

This preface provides a list of common elements and an overview of Oracle's PeopleSoft Catalog Management.

PeopleSoft Catalog Management

Oracle's PeopleSoft Catalog Management offers a unique solution to catalog integration. It simplifies catalog aggregation and maintenance by enabling organizations to build and maintain taxonomies, define transformation and cleansing rules, import and update partner content, automatically categorize products, manage catalog versions, and syndicate catalog content. PeopleSoft Catalog Management resolves the issues associated with catalog aggregation and maintenance, and ensures successful web-based implementation of applications requiring catalog content.

In PeopleSoft Catalog Management, an *enterprise* is the company (organization, distributor, service provider) that has purchased PeopleSoft Catalog Management and maintains the enterprise catalog. A *partner* is a company that supplies product or services that are then resold or purchased by the enterprise. Partners are often referred to as suppliers.

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online 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 locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.

- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Common Elements Used in This PeopleBook

Offering ID and Description The catalog offering ID and offering description fields are named differently based on the catalog type. For example:

Procurement: Item ID.

Customer: Product ID.

Training: Catalog Item ID.

Note. There are also variations of some other fields based on catalog type.

Screenshots for this book were taken using a procurement catalog.

Partner ID and Version Values are based on the selected partner catalog selected on the Enterprise Catalog Console page.

SetID and Catalog ID Values are based on the selected enterprise catalog on the Catalog Management Home page.

Chapter 1

Getting Started With PeopleSoft Catalog Management

This chapter provides an overview of Oracle's PeopleSoft Catalog Management application and discusses:

- PeopleSoft Catalog Management business processes.
- PeopleSoft Catalog Management integrations.
- PeopleSoft Catalog Management implementation.

PeopleSoft Catalog Management Overview

PeopleSoft Catalog Management simplifies catalog content integration, enabling organizations to:

- Register and maintain catalog partners.
- Import and update partner content.
- Define transformation and filtering rules to convert content.
- Build and maintain category hierarchies.
- Automatically categorize product offerings.
- Manage enterprise catalog and partner catalog versions.
- Syndicate catalog content.

See Also

[Chapter 4, "Setting Up PeopleSoft Catalog Management," Registering Catalog Partners, page 28](#)

[Chapter 6, "Importing Partner Source Files," page 41](#)

[Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," page 57](#)

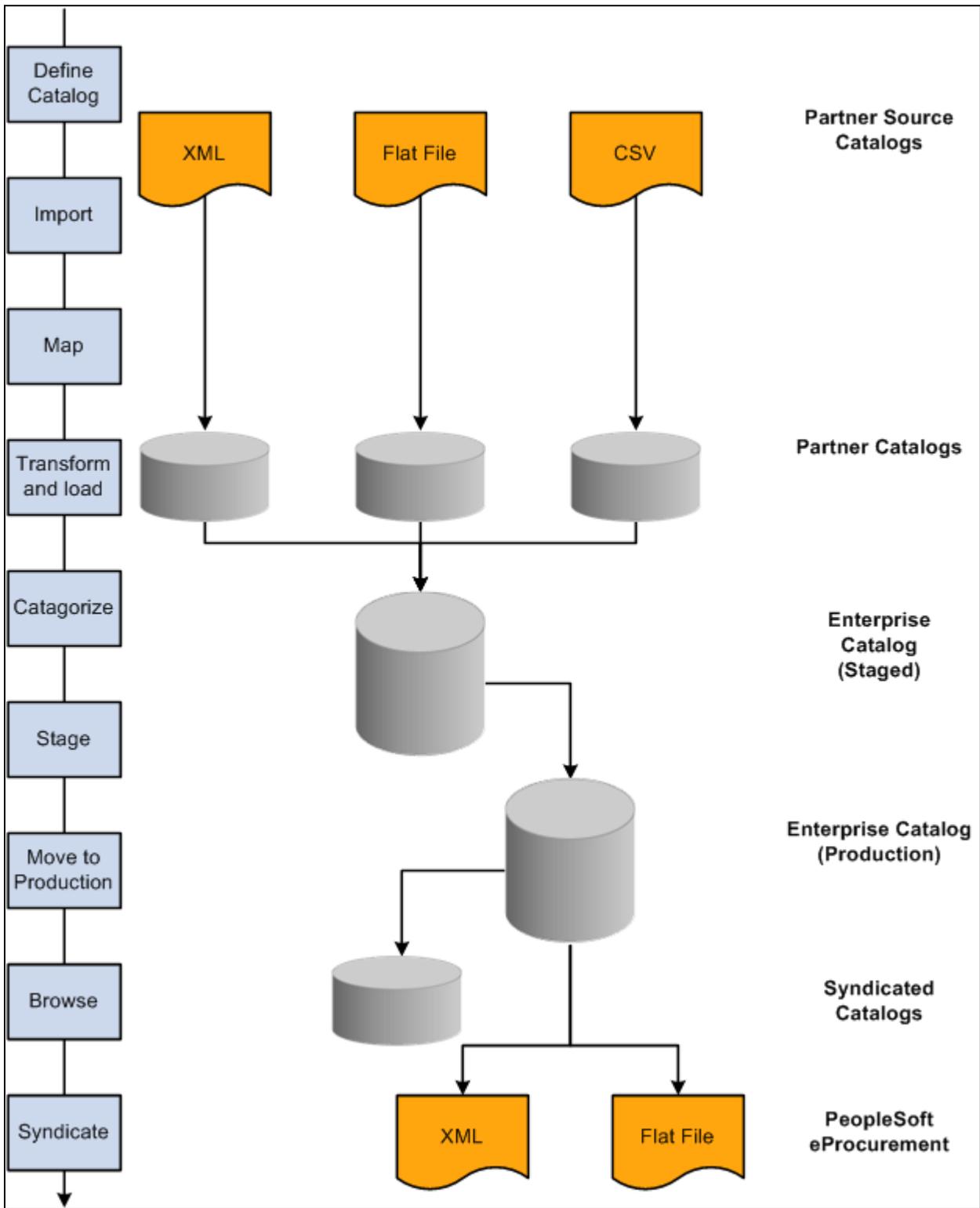
[Chapter 8, "Categorizing Offering Data," page 73](#)

[Chapter 9, "Staging and Browsing Partner Offerings," page 93](#)

[Chapter 10, "Producing and Syndicating Enterprise Catalogs," page 99](#)

PeopleSoft Catalog Management Business Processes

The following diagram illustrates the catalog management business process flow.

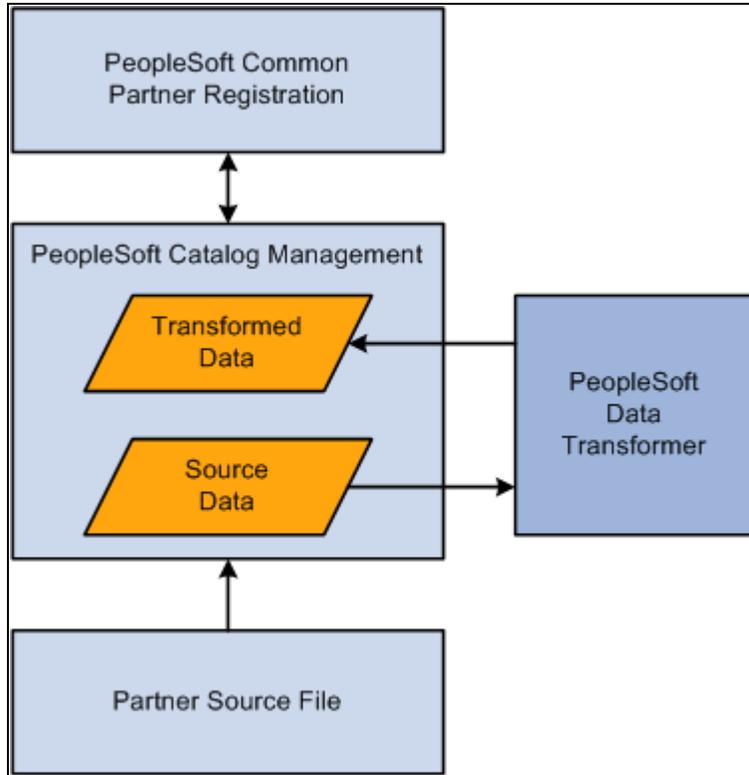


PeopleSoft Catalog Management business process flow

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

PeopleSoft Catalog Management Integrations

PeopleSoft Catalog Management integrates with the PeopleSoft products like Common Partner Registration, Data Transformer and Partner Source File.



PeopleSoft Catalog Management integration flow with other PeopleSoft products

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

PeopleSoft Catalog Management Implementation

PeopleSoft Catalog Management implementation can be divided into the following activities:

- Store attachment files.
- Define installation options.
- Create categories and category hierarchies.
- Create enterprise catalog definitions.
- Register partners.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and business process maps.

Storing Attachment Files

PeopleSoft Catalog Management allows you to capture, store, and utilize attributes related to an offering.

Step	Reference
Define the URL identifier for the file server where you are storing attachments.	See <i>PeopleTools PeopleBook: PeopleSoft System and Server Administration</i>

Defining Installation Options

PeopleSoft Catalog Management installation options are entered at the time of implementation:

Step	Reference
Define PeopleSoft Catalog Management installation options.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Installation Options, page 18.
Define fields for categorization rules.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Selecting Fields for Categorization Rules, page 20.
Define default workflow notifications.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Default Workflow Notifications, page 20.

Creating Categories and Category Hierarchies

With PeopleSoft Catalog Management, you can either create categories and category hierarchies, or you can use the United Nations Standard Products and Services Classification Code (UNSPSC).

Step	Reference
Create categories.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Categories, page 23.
Create category hierarchies.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Category Hierarchies, page 24.
Load UNSPSC.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Loading Hierarchies, page 26.

Creating Enterprise Catalog Definitions

The following table describes the steps required to create an enterprise catalog definition of a given type.

Step	Reference
Define general catalog information.	See Chapter 5, "Creating Enterprise Catalog Definitions," Defining General Catalog Information, page 35.
Assign enterprise managers and grant privileges.	See Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Enterprise Managers and Granting Privileges, page 36.
Assign partners and grant privileges.	See Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37.
Associate category hierarchies.	See Chapter 5, "Creating Enterprise Catalog Definitions," Associating Category Hierarchies, page 38.
Specify workflow options.	See Chapter 5, "Creating Enterprise Catalog Definitions," Specifying Workflow Options, page 39.

Registering Partners

The catalog administrator can register partners within PeopleSoft Catalog Management. The system automatically approves the registration and updates PeopleSoft Maintain Catalog Partners.

Step	Reference
Create Provide Catalog Information and View Catalog Information services within PeopleSoft Maintain Catalog Partners. In order to register partners in PeopleSoft Catalog Management the provide and view catalog information services must be created within the PeopleSoft Maintain Catalog Partners component.	See Chapter 1, "Getting Started With PeopleSoft Catalog Management," Creating Enterprise Catalog Definitions, page 5.
Register partners.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Registering Catalog Partners, page 28.
Associate users with registered partners.	See Chapter 4, "Setting Up PeopleSoft Catalog Management," Adding New Partner Information, page 29

Chapter 2

Understanding PeopleSoft Catalog Management

This chapter provides an overview of Catalog Management and discusses how to:

- Manage partner processes.
- Create category hierarchies.
- Define transformations.
- Define categorization.
- Create versioning.
- Archive and purge.
- Manage security.
- Define roles.

Managing Partner Processes

Catalog Management enables the organization to share catalog content with partners. Partners can import and manage their own content. Partners can:

- Define the catalog source.
- Import, transform, and load content into the catalog.
- Categorize offering data and review categorization results.
- Stage approved catalog offerings.
- Manually update their data.
- Browse staged and production versions of the enterprise catalog.

See Also

[Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37](#)

Creating Category Hierarchies

With Catalog Management, you can either create categories and category hierarchies, use the United Nations Standard Products and Services Classification code (UNSPSC), or use PeopleSoft trees. You can support multiple hierarchies within a catalog in order to syndicate content for customers or partners using their preferred category hierarchy. You can:

- Add and maintain categories.
- Rearrange the category hierarchy.
- Create an unlimited number of category levels.
- Import the UNSPSC hierarchy.
- Use category hierarchies set up by Tree Manager.
- Manage multiple hierarchies within a single catalog.

See Also

[Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Categories and Category Hierarchies, page 22](#)

Defining Transformations

Every partner's content is different in format and structure, and every catalog requires its own format and structure based on its type. You can define transformations to translate each partner's catalog content into the appropriate catalog format and structure. To simplify the source-to-target mapping effort, Catalog Management automates most data transformation setup and maintenance. Before defining catalog maps, you can:

- Set up target field default values.
- Define filtering rules to identify structured content that does not meet standard criteria.
- Standardize the domain of attribute values by replacing attribute values with equivalent predefined values.
- Perform calculations to derive additional attributes.
- Perform string manipulations.

See Also

[Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Understanding the Transformation and Loading Process, page 64](#)

Defining Categorization

Organizing offerings into a category hierarchy enables users to quickly search and locate appropriate products and services. With Catalog Management, you can:

- Automatically categorize content based on offering names or partner categories.
- Assign an offering to one or more categories in a hierarchy.
- Match offerings from multiple partners into a common catalog offering, or create a separate catalog offering for each partner and offering combination.

See Also

[Chapter 8, "Categorizing Offering Data," page 73](#)

Creating Versioning

Catalog Management maintains multiple versions of both partner catalogs and enterprise catalogs.

A new version of a partner catalog is created when the process to load partner offerings is run.

Content updates are applied to a staged copy of the unified catalog, and then moved to production, enabling review and verification of the content prior to syndication. When the process to move the catalog to production is run, a new catalog version is created by incrementing the version by one. As a result, changes can be made to the catalog without hindering day-to-day browsing, syndication, and purchasing needs.

Once a version is selected for production, all other versions are stored but not used again. The Remove Unused Versions feature provides a way for the catalog manager to remove these unused partner versions.

Archiving and Purging

Archiving catalog data allows catalog managers to manage the volumes of data maintained by Catalog Management by moving enterprise catalog data, that is no longer required, to history files. Removing this historical data from online tables prevents the database from increasing to an unmanageable size, and improves overall performance. The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

Managing Security

With Catalog Management, both you and your partners use the same application for importing and managing structured content. The configurable security model built into Catalog Management enables you to:

- Create and manage users and roles using standard PeopleTools user administration.
- Assign user privileges to perform catalog administration functions, such as categorizing partner content, syndicating content, and moving a catalog to production.

Defining Roles

There are four significant roles in Catalog Management: the administrator, the taxonomist, the manager within the enterprise, and the catalog partner.

Enterprise Catalog Administrator

The enterprise catalog administrator has access to all catalog setup information and the ability to assign themselves as an enterprise catalog manager for all catalogs that he or she creates. This person creates catalogs and grants catalog access.

Note. Only enterprise catalog managers can gain access to catalog content.

Taxonomist

The taxonomist defines categories and category hierarchies.

Enterprise Catalog Manager

The enterprise catalog manager has access to catalogs to create and maintain data. This person manages data on behalf of a partner or for items provided directly by the enterprise. The catalog manager performs these activities:

- Catalog, partner, and partner offering maintenance.
- Importing, transforming, and loading data.
- Categorization.
- Staging.
- Moving catalogs to production.
- Rollback (Return to a previous version of the production catalog).
- Syndication.
- Browsing enterprise and partner offerings.
- Manually updating enterprise catalog offerings and partner offerings.

Catalog Partner

Catalog partners can access only their own catalogs. Access is determined by permissions assigned at the catalog level. The enterprise catalog manager and the catalog partner share the responsibility for catalog content maintenance. The catalog partner performs these activities:

- Partner offering maintenance.
- Importing, transforming, and loading data.
- Categorization.
- Staging.
- Browsing partner offerings.
- Manually updating partner offerings.

Chapter 3

Accessing PeopleSoft Catalog Management Functions

This chapter discusses how to navigate PeopleSoft Catalog Management.

Navigating PeopleSoft Catalog Management

This section provides an overview of Catalog Management navigation.

Understanding PeopleSoft Catalog Management Navigation

Catalog Management provides multiple levels of navigation. Activities that do not require you to select an existing catalog are available from the application homepage. These activities are also available from the menu navigation.

You also use the homepage to select a specific enterprise catalog and access the Enterprise Catalog Console page, where you can perform activities such as moving the catalog to production, rolling back the catalog to another version, and syndicating the catalog. On this page, you can select a partner catalog to access the Partner Catalog Console page and manage data for the partner catalog. Enterprise and partner catalog activities are not available from the menu navigation; you can only access them from the Enterprise Catalog Console and Partner Catalog Console pages.

From the homepage or menu navigation, you can:

- Create and maintain catalogs.
- Create and maintain catalog partners.
- Specify file formats for catalog source data.
- Import partner data.
- Define workflow preferences.
- Create and maintain categories and category hierarchies.
- Load the United Nations Standard Products and Services Classification (UNSPSC) scheme or a PeopleSoft tree into a category hierarchy.
- Create and maintain category rules and substitutions.
- Select an enterprise catalog to work with.

From the Enterprise Catalog Console page, you can:

- Move a staged catalog to production.
- Roll back the production catalog to a previous version.
- Syndicate the catalog to partners.
- Browse the staged or production catalog.
- Define a master catalog map.
- Manually enter or change catalog data.
- Archive, purge, or restore catalog data.
- Select a partner catalog to work with.

From the Partner Catalog Console page, you can:

- Map partner catalog structure to the catalog structure.
- Load partner data.
- Categorize partner data and review and approve the results.
- Stage the partner catalog.
- Browse the partner catalog.
- Manually enter or change catalog data.
- Compare partner catalog versions.
- Remove unused partner catalog versions.

Important! If a user has not been granted privileges for certain activities using PeopleTools Security Administration, the links to those activities are not displayed.

Pages Used to Navigate PeopleSoft Catalog Management

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Catalog Management Home	EOCM_MAIN_PAGE	Catalog Management, Catalog Management Home	Create and maintain catalogs, partners, and categories. Select an enterprise catalog to work with.
Enterprise Catalog Console	EOCM_CATALOG_DASH	Catalog Management, Catalog Management Home Select an enterprise catalog.	Produce, roll back, syndicate, and browse the selected catalog. Update catalog data. Select a partner catalog to work with.

Page Name	Definition Name	Navigation	Usage
Partner Catalog Console	EOCM_PARTNER_DASH	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog.	Manage and view partner submissions to the selected enterprise catalog.

Chapter 4

Setting Up PeopleSoft Catalog Management

This chapter provides an overview of Catalog Management setup and discusses how to:

- Store attachment files.
- Define installation options.
- Define default workflow notifications.
- Create categories and category hierarchies.
- Register catalog partners.

Storing Attachment Files

This section provides an overview of the attachments and images feature, and discusses how to store attachment files.

Understanding Attachments and Images Feature

The Attachments and Images feature allows you to capture, store, and utilize attributes related to an offering. These attributes can be the visual representation of an offering, the owner's manual in pdf form, or any type of file.

While browsing offerings within either a staged or production version of the catalog, the attachments and images feature allows users to:

- Link to the partner's website and view the offering's specifications at the source.
- View one or more attachment files that can be of any type, including a picture.

The system allows multiple attachments to be associated to a single offering.

Storing Attachment Files

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

URL Maintenance

URL Identifier: EOCM_ATT_URL

*Description:

*URL:

Comments:

URL Maintenance page

Use this page to define the URL identifier for the file server where you are storing attachments. Catalog Management uses the URL Identifier named EOCM_ATT_URL.

Note. To launch the attachments from within Catalog Management, this URL identifier must be defined.

To define the Catalog Management URL identifier:

1. Define and share a common file server folder to store the attachments.

In order to be accessed by the application servers, this folder must be shared.

2. Access the URL Maintenance page.

Select the URL Identifier named EOCM_ATT_URL.

3. Enter the URL using the format ftp://userid:password@localhost.

4. Click Save.

Defining Installation Options

To define installation options, use the Installation Options (EOCM_INSTALLATION) component.

This section discusses how to:

- Specify installation parameters.
- Select fields for categorization rules.

Pages Used to Define Installation Options

Page Name	Definition Name	Navigation	Usage
Installation Options	EOCM_INSTALL_PAGE	Catalog Management, Define Installation Options	Specify installation parameters.
Procurement Categorization	EOCM_SETCAT_EPRO	Catalog Management, Define Installation Options, Procurement Categorization	Select fields for procurement categorization rules.
Customer Categorization	EOCM_SETCAT_CRM	Catalog Management, Define Installation Options, Customer Categorization	Select fields for customer categorization rules.
Training Categorization	EOCM_SETCAT_ELM	Catalog Management, Define Installation Options, Training Categorization	Select fields for training categorization rules.

Specifying Installation Parameters

Access the Installation Options page (Catalog Management, Define Installation Options, Installation Options).

Installation Options
Procurement Categorization
Customer Categorization


Catalog Management Installation Options

*TableSpace for Catalog Sources: 

*URL for Attachments: 

*Role for Catalog Partner User:
(e.g. Catalog Partner) 

Customer Catalog: Procurement Catalog: Training Catalog:

Last Table Number: 200 Last Map Number: 200

Create Table Dynamically: Y The option chosen to dynamically create tables in Data Transformer also controls the dynamic creation of tables in Catalog Management.

[Go to Data Transformer Installation Options Page](#)

Installation Options page

TableSpace for Catalog Sources	Select where to store the temporary tables associated with the catalog source data. This is used for all database platforms where tables must be stored in tablespaces.
URL for Attachments	Enter the URL that represents either the File Transfer Protocol (FTP) address or the database table used for storing the catalog source files, which are loaded as attachments. This URL is required to load source files.
Role for Catalog Partner User	Select the role to assign to partner users entered using the Maintain Catalog Partners component.
Procurement Catalog, Customer Catalog, and Training Catalog	Select the types of catalogs that you use. The types of catalogs selected here are the only types available when defining a new enterprise catalog.
Last Table Number	Displays the last sequential table number used for creating catalog sources. Tables are named using EOCM_TMPxxxxxx format. xxxxxx is replaced with the table number.
Last Map Number	Displays the last sequential map number used for creating catalog maps. Maps are named using CCM_XXXXXXXX format. XXXXXXXX is replaced with the map number.
Create Table Dynamically	The option chosen to dynamically create tables in Data Transformer also controls the dynamic creation of tables in Catalog Management.

See Also

[Chapter 5, "Creating Enterprise Catalog Definitions," Defining General Catalog Information, page 35](#)

Selecting Fields for Categorization Rules

Access the Procurement Categorization, Customer Categorization or Training Categorization page (Catalog Management, Define Installation Options, Procurement Categorization).

On each page, select the fields to use for matching partner offerings to your offerings. Categorization rules are based on the selected fields.

Defining Default Workflow Notifications

To define default workflow notifications, use the Catalog Notification (EOCM_DEFLT_NOTIFY) component.

This section provides an overview of notification details and discusses how to define default notifications.

Understanding Workflow Notifications

When managing catalogs, workflow notifications can be used to inform partners and managers of status changes and other relevant activities. Using workflow, automatic notifications can be sent to catalog managers when work needs to be reviewed or approved, or when a process, such as categorization or load, has finished. Email notifications can be triggered for these stages:

- Loaded.
- Categorized.
- Offering approved.
- Categories approved.
- Staged.
- Moved to production.
- Rolled back.
- Syndicated.

Note. A worklist notification is also triggered for the approval process since action is required from the enterprise catalog manager before the approval process is completed.

Pages Used to Define Default Workflow Notifications

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Notification Defaults	EOCM_DEFLT_NOTIFY	Catalog Management, Catalog Management Home Page, Define Notification Defaults	Specify the process stages when users should be notified.

Defining Default Notifications

Access the Define Notification Defaults page (Catalog Management, Catalog Management Home Page, Define Notification Defaults).

Define Notification Defaults

Notification Defaults
Customize

	*Notification	Notification Method		
1	<input type="text" value="2 Categorized"/>	E-mail and Worklist	<input type="button" value="+"/>	<input type="button" value="-"/>
2	<input type="text" value="3 Offering, Categories Approval"/>	E-mail only	<input type="button" value="+"/>	<input type="button" value="-"/>
3	<input type="text" value="5 Move to Production"/>	E-mail only	<input type="button" value="+"/>	<input type="button" value="-"/>
4	<input type="text" value="6 Rolledback"/>	E-mail only	<input type="button" value="+"/>	<input type="button" value="-"/>
5	<input type="text" value="7 Syndicated"/>	E-mail only	<input type="button" value="+"/>	<input type="button" value="-"/>

[Go to Catalog Management Home](#)

Define Notification Defaults page

Specify the different stages of the process when users should be notified. The notification method is displayed. The stages selected here can be changed for individual catalogs.

See Also

[Appendix B, "Setting Security Options For Workflow," page 121](#)

[Chapter 5, "Creating Enterprise Catalog Definitions," Specifying Workflow Options, page 39](#)

Creating Categories and Category Hierarchies

To create categories and category hierarchies, use the Category (EOCM_CATEGORY), Load Category Hierarchy (EOCM_LOAD_UNSPSC), and Category Hierarchy (EOCM_HIERARCHY) component.

This section provides an overview of categories and category hierarchies and discusses how to:

- Create categories.
- Create category hierarchies.
- Load hierarchies.

Understanding Categories and Category Hierarchies

You use categories to assemble similar offerings into groups. With categories, similar offerings are members of a class, similar classes are members of a more general class, or family, and so on. The relationship among offerings and the relationship of an offering to its class are necessary for effectively searching and finding appropriate products and services.

A hierarchy organizes available offerings into parent and child relationships.

With Catalog Management, you can either create categories and category hierarchies, use the UNSPSC, or use PeopleSoft trees.

The UNSPSC system is an open, global electronic commerce standard that provides a logical framework for classifying products and services. The UNSPSC is a hierarchal classification with five levels. The levels allow users to search products more precisely, because searches are confined to logical categories.

For example, the commodity Pen Refills is part of a larger class of products, Ink and Lead Refills, which in turn is part of a family of products, Office Supplies, which is itself part of a segment of products, Office Equipment, Accessories, and Supplies. Each level of the hierarchy has its own unique number.

Pages Used to Create Categories and Category Hierarchies

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Categories	EOCM_CATEGORY	Catalog Management, Categories, Maintain Categories	Create and maintain categories (groupings of offerings) that are used within category hierarchies.
Maintain Category Hierarchies	EOCM_CAT_HIER	Catalog Management, Categories, Maintain Category Hierarchies	Create and maintain hierarchical structures for displaying catalog offerings.
Load Hierarchy	EOCM_LOAD_UNSPSC	Catalog Management, Categories, Load Hierarchy	Load the UNSPSC classification scheme or a PeopleSoft tree into a category hierarchy.

Creating Categories

Access the Maintain Categories page (Catalog Management, Categories, Maintain Categories).

Category Name Enter a name to describe the group of offerings.

Comments Enter a more detailed description.

Category Code

(Options) Enter a code for this category.

This field is used when downloading the UNSPSC classification scheme into a category hierarchy.

Creating Category Hierarchies

Access the Maintain Category Hierarchies page (Catalog Management, Categories, Maintain Category Hierarchies).

Maintain Category Hierarchies

Select a category by clicking its folder's label in the folder hierarchy. Click the action button for the action you wish to perform on that category (Add, Copy, Remove). Click the Refresh button to see changes reflected in the folder hierarchy.

Category Hierarchy ID: APPAREL

*Category Hierarchy Name: Root Node:

Add Category

Category ID:

Category Name:

[Create new Category](#)

To move the selected category, copy that category to the new folder, then remove the category from the prior folder.

Find Category

Enter the category name or code to search

*Search By: Category Name

Matching Category ID	Matching Category Name	Parent Category ID
LOGO WATCHES	Logo Watches	LOGO ACCESSORIES
LOGO WEAR	Logo Wear	LOGO MERCHANDISE

Left | Right

- APPAREL
 - LOGO MERCHANDISE - Logo Merchandise
 - LOGO ACCESSORIES - Logo Accessories
 - LOGO PACKS - Logo Packs
 - LOGO WATCHES - Logo Watches**
 - LOGO WEAR - Logo Wear
 - SNOW GEAR - Snow Gear

Maintain Category Hierarchies page

Create and maintain hierarchical structures to display catalog offerings. Category hierarchies have their own IDs, so they can be used across multiple catalogs.

Category Hierarchy Name Enter a unique name to describe this hierarchy.

Refresh Click to refresh the hierarchy tree after returning from the Copy Category page.
The hierarchy tree is resorted alphabetically within a branch and reflects all changes.

Add Category To add an existing category to the hierarchy:

1. Select the parent category in the hierarchy tree
2. Select a category.
3. Click Add.

The category appears in the tree as the child of the selected parent category.

To add a new category:

1. Select the parent category in the hierarchy tree.
2. Click the Create New Category link to display the Maintain Categories page.
3. Enter the new category ID, name, and comments. Click OK.

The new category ID and name appear in the Add Category section.

4. Click Add.

The category appears as the child of the selected parent category.

Copy the Selected Category To copy a category to another location in the hierarchy:

1. Select the category to copy, and click Copy the Selected Category to display the Select Category page.
2. Highlight the category that you want as the parent of the copied category, and click OK.

The selected category is copied to its new parent. If children exist, they are also copied.

Remove Category From Hierarchy

Select the category to remove, and click Remove Category From Hierarchy. The category is not removed if:

- Offerings are present.
- Children exist.

Note. To move a category, first copy the category to the new parent, then remove the original category.

Find Category Feature

The Find Category feature allows you to easily search for a category in any hierarchy. The system will automatically expand the hierarchy from the root to the category being searched. This is useful in cases where there are several levels of categories, or where a category is present in multiple paths.

You can search categories by code or by name. For name searches a partial name can be entered, and a list of all categories that match the search criteria are returned. If a category matching the search criteria is present in multiple paths all paths are returned. Click the category ID of the desired category. The category hierarchy will expand and the selected category will be highlighted in the hierarchy.

Note. By default, the group box is collapsed when you first access the page.

Loading Hierarchies

Access the Load Hierarchy page (Catalog Management, Categories, Load Hierarchy).

Load Hierarchy

Run Control ID: JMC001

*Category Hierarchy ID:

*Category Hierarchy Name:

*Hierarchy Type:

Select Tree

SetID: Tree Name: [View Tree](#)

Category Code:

Overwrite

[Go to Catalog Management Home](#) [Process Monitor](#)

Load Hierarchy page

Hierarchy Type

Select *PS Tree* or *UNSPSC*.

Note. If you choose *UNSPSC*, you need to download the file from the UNSPSC homepage and save it as a text (tab-delimited) file. If you choose *PS Tree* the fields in the Select Tree group box become active.

SetID and Tree Name

Select a SetID and Tree Name to choose a PeopleSoft tree. Click the View Tree link to open a new browser window and view the selected tree in Tree Manager's View Tree component.

Category Code

Select a field from the Tree Manager node record, which you want to use to populate the category code field in Catalog Management. If no node record field qualifies as a category code leave this field blank.

Note. The Lookup is dynamically populated based on the tree you select.

Overwrite

Select if the hierarchy already exists and you want to replace it. Deselect for the hierarchy to be assumed unique and added.

Load Hierarchy

Click to run the application engine EOCM_UNSPSC process.

Note. You will be prompted to locate and select the file on the computer. When selected, the navigation path appears. Click the Upload button to process the request.

The process is submitted. Click the Process Monitor link to monitor the status requests. When the process has completed successfully, the categories and hierarchy are available in Catalog Management.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Registering Catalog Partners

To register catalog partners, use the Maintain Catalog Partners (EOTP_QUICKPARTNER) component.

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

- Add new partner information.
- Add partner address information.

Understanding Catalog Partner Registration

As part of defining a catalog, you specify which partners provide or view catalog content, and you grant specific security authorization to individual partner users. Before you can do this, the partners must be registered and approved in Maintain Catalog Partners.

The basic steps to complete partner registration are:

1. Create required Catalog Management services.

Services are created automatically within Maintain Catalog Partners if they do not exist for the process and Set ID combinations selected when a partner is created through Catalog Management.

2. Register the partner.
3. Approve the registration and notify the partner.

Partners registered using the Maintain Catalog Partners component are automatically approved.

4. Associate users with the registered partner.

You use the Maintain Catalog Partners component to register partners for Catalog Management. Once the registration is complete, you can manually send the partner an email acknowledging approval, along with the URL, user ID and password required to access the PeopleSoft system. The partner can then add individual users who are responsible for either performing catalog management tasks and activities or just viewing the catalog.

Note. Partners who require registration approval for services outside of Catalog Management must be registered using the Maintain Catalog Partners system.

When defining a new enterprise catalog, privileges are granted to individual partner users for performing specific tasks and activities.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37

Appendix C, "Setting Automatic Daily Partner Cleanup," page 125

Pages Used to Maintain Catalog Partners

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Catalog Partners - Information	EOTP_CATPARTNER	Catalog Management, Maintain Catalog Partners	Create and maintain catalog partners and partner users, and grant access privileges.
Maintain Catalog Partners - Addresses	EOTP_PRT_ADDR2	Catalog Management, Maintain Catalog Partners, Addresses	Enter a partner's company address and alternate address information. Update a partner's address information, then click the Save button.

Adding New Partner Information

Access the Maintain Catalog Partners - Information page (Catalog Management, Maintain Catalog Partners, Information).

Information
Addresses

*Partner ID: *Company Name:

Primary Contact

*First Name: *Last Name:

*E-mail Address:

Phone Number: Ext: Fax:

SETIDs for Catalog Partner Find | View All | First 1-2 of 2 Last

SetID	Description	Provide Catalog Information	View Catalog Information		
1	<input type="text" value="SHARE"/>	CORPORATE SETID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="text" value="US001"/>	US001 NEW YORK OPERATIONS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Partner Users Find | View All | First 1 of 1 Last

User ID: Partner Administrator:

Description:

Password:

Confirm Password:

SETIDs for Catalog User Find | View All | First 1-2 of 2 Last

*SetID	Description	Provide Catalog Information	View Catalog Information		
1	<input type="text" value="SHAR"/>	CORPORATE SETID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="text" value="US00"/>	US001 NEW YORK OPERATIONS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

[Go to Catalog Management Home](#)

Maintain Catalog Partners - Information page

Note. To create partner user profiles, the Partner ID user profile type must be enabled.

SETIDs for Catalog Partner

Define the setIDs that each partner can access. You must select at least one setID. If catalog services do not exist in the system for the selected setID, the system automatically creates them and assigns them to the partner as requested.

Provide Catalog Information Select if any users associated with this setID are responsible for performing catalog management tasks and activities.

View Catalog Information Select if any users associated with this setID have access to view catalogs only.

Partner Users

Enter information for each individual user associated with the partner. Only setIDs assigned to the partner can be assigned to the partner user.

User ID Enter a unique ID for the user to access the Catalog Management system

Description Enter up to a 30-character description, such as the user's name

Operator Password (Encrypted) and Confirm Password Enter and confirm a password for the user to access Catalog Management.

Partner Administrator Select if this user is an administrator.

Note. Partner administrators have access to this page to add new partner users and revoke or assign catalog services to existing partner users.

SETIDs for Catalog User

Define the setIDs and access privileges for each partner user. All partner users are assigned the role defined with the Define Installation Options component.

If the partner is granted access to only view catalog information, the Provide Catalog Information option is not available on the partner users grid.

Note. The catalog partner role must be defined on the Installation Options page before partner user profiles can be created.

Saving Partner Information

Once saved:

- The partner is automatically registered with Partner status.
- Services associated with the partner are automatically assigned and approved.
- Partner user profile attributes can only be changed through PeopleTools security.

See Also

PeopleTools PeopleBook: PeopleTools Security.

Adding Partner Address Information

Access the Maintain Catalog Partners - Addresses page (Catalog Management, Maintain Catalog Partners, Addresses).

Note. Address fields shown on the page are specific to the chosen country.

Corporate Address and Alternate Address

Corporate Address is automatically selected when you first open this page. If you select to add a second address, Alternate Address is automatically selected.

Note. Only two addresses can be added for a single partner.

Address fields

Displays the company's address once it has been entered.

Chapter 5

Creating Enterprise Catalog Definitions

This chapter discusses how to create new enterprise catalogs.

Note. This activity is performed by the enterprise catalog administrator.

Defining New Enterprise Catalogs

To define enterprise catalogs, use the Maintain Catalogs (EOCM_CATALOG) component.

This section defines the common elements and discusses how to:

- Define general catalog information.
- Assign enterprise managers and grant privileges.
- Assign partners and grant privileges.
- Associate category hierarchies.
- Specify workflow options.

Common Elements Used in This Chapter

Categorize	Select to grant privileges to categorize partner offerings and review results.
Define Map	Select to grant privileges to map partner source attributes to the enterprise catalog's attributes.
Load Data	Select to grant privileges to transform source data to the enterprise catalog format.
Notify	Select to receive workflow notifications based on the workflow options set for this catalog and the user's privileges.
Stage	Select to grant privileges to move a partner's input to staging. Staging indicates that a partner's input to the catalog is ready for inclusion in the enterprise catalog.

See Also

Chapter 8, "Categorizing Offering Data," page 73

Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Defining Catalog Maps, page 57

Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Transforming and Loading Data, page 64

Chapter 9, "Staging and Browsing Partner Offerings," Staging Partner Offerings, page 93

Pages Used to Define New Enterprise Catalogs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
General	EOCM_CATALOG_MAIN	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General Catalog Management, Catalogs, Maintain Catalogs, General	Enter general catalog information, including name and catalog type.
Enterprise Managers	EOCM_CATALOG_MAN	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Enterprise Managers Catalog Management, Catalogs, Maintain Catalogs, General, Enterprise Managers	Assign enterprise managers and grant privileges.
Partners	EOCM_CATALOG_TP2	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Partners Catalog Management, Catalogs, Maintain Catalogs, General, Partners	Assign partners and grant privileges.
Categories	EOCM_CATALOG_CAT	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Categories Catalog Management, Catalogs, Maintain Catalogs, General, Categories	Associate category hierarchies.

Page Name	Definition Name	Navigation	Usage
Workflow Options	EOCM_CATALOG_WORKF	Catalog Management, Catalog Management Home Page, Maintain Catalogs, General, Workflow Options Catalog Management, Catalogs, Maintain Catalogs, General, Workflow Options	Specify the Catalog Management process stages to notify enterprise managers and partners.

Defining General Catalog Information

Access the Maintain Catalogs - General page (Catalog Management, Catalogs, Maintain Catalogs, General).

Maintain Catalogs - General page

Catalog Type

Select from *Training*, *Procurement*, or *Customer*.

Note. The catalog types listed are based on selected installation options.

Catalog Version

Displays the latest working catalog version.

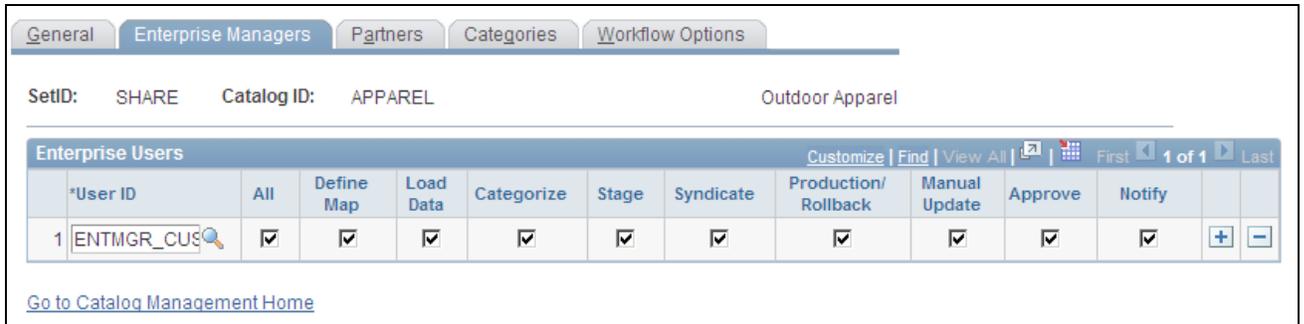
Note. For a new enterprise catalog, the version is *1*. When the catalog is successfully moved to production, the version number for the working catalog is incremented by one.

See Also

[Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Installation Options, page 18](#)

Assigning Enterprise Managers and Granting Privileges

Access the Maintain Catalogs - Enterprise Managers page (Catalog Management, Catalogs, Maintain Catalogs, Enterprise Managers).



Maintain Catalogs - Enterprise Managers page

User ID

Select the enterprise managers assigned to this catalog.

All

Select to grant privileges for all activities. Deselect the box to select activities individually.

Note. When All is selected, the system automatically selects all activities except Notify. Select Notify manually if the enterprise manager wants to be notified at the completion of certain processes for which he or she has authorization.

Syndicate

Select to grant privileges to syndicate the production catalog.

Syndication is the distribution of the approved production catalog to partners.

Production/Rollback

Select to grant privileges to move the staged version of the enterprise catalog to production, or to roll back a production version of the enterprise catalog to a previous version.

Manual Update

Select to grant privileges to manually enter and change data about partner offerings and enterprise catalog data.

Approve

Select to grant privileges to approve or reject proposed categories and catalog offerings that result from the Categorize Partner Offerings process. A worklist is automatically created for this user.

Note. All enterprise catalog managers are automatically granted browsing privileges to the enterprise catalog and all partner catalogs, both in staged and production status.

Users must also be assigned with the appropriate roles using PeopleTools Security or they will not have access, despite the selections made here.

See Also

[Chapter 2, "Understanding PeopleSoft Catalog Management," Defining Roles, page 10](#)

[Chapter 10, "Producing and Syndicating Enterprise Catalogs," Syndicating Catalogs, page 104](#)

[Chapter 10, "Producing and Syndicating Enterprise Catalogs," Moving Catalogs to Production, page 99](#)

[Chapter 11, "Maintaining Enterprise Catalog and Partner Offerings," page 111](#)

[Chapter 8, "Categorizing Offering Data," Approving Categorization Results, page 90](#)

Assigning Partners and Granting Privileges

Access the Maintain Catalogs - Partners page (Catalog Management, Catalogs, Maintain Catalogs, Partners).

SetID: SHARE Catalog ID: APPAREL Outdoor Apparel

Partners Find | View All First 1 of 3 Last

*Partner ID: 1002 Trailblazers Status: Active

Partner Users Customize | Find | View All First 1 of 1 Last

*User ID	Define Map	Load Data	Categorize	Stage	Manual Update	Browse Enterprise Stage	Browse Enterprise Production	Notify
1 LHILL	<input type="checkbox"/>	<input type="checkbox"/>						

[Go to Catalog Management Home](#)

Maintain Catalogs - Partners page

Partner ID

Select the partners assigned to this catalog who will be providing catalog content, viewing catalog content, or both.

Note. You can only select partners that are registered and have approval for either Provide Catalog Information or View Catalog Information Catalog Management service processes.

Status	Displays the current status of the selected partner, <i>Active</i> or <i>Inactive</i> . Partners become active when they have registered and have been approved for at least one Catalog Management service process. Their status becomes inactive if they terminate their registration using Maintain Catalog Partners.
User ID	Select partner users. <hr/> Note. You can only select users that are associated with the selected partner in the Common Registration component. <hr/>
Manual Update	Select to grant privileges to manually enter and change data about partner offerings.
Browse Stage and Browse Production	For staging and production catalogs, select to grant privileges to: <ul style="list-style-type: none"> • Browse the enterprise catalog by offering. • Browse the enterprise catalog by hierarchy.

Note. If a partner is granted privileges to browse enterprise catalogs, data supplied by all partners is accessible. Privileges to browse at the partner catalog level are automatically granted.

See Also

[Chapter 4, "Setting Up PeopleSoft Catalog Management," Registering Catalog Partners, page 28](#)

[Chapter 11, "Maintaining Enterprise Catalog and Partner Offerings," Maintaining Partner Data, page 113](#)

[Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Offerings, page 94](#)

[Chapter 10, "Producing and Syndicating Enterprise Catalogs," Browsing Production Offerings, page 100](#)

Associating Category Hierarchies

Access the Maintain Catalogs - Categories page (Catalog Management, Catalogs, Maintain Catalogs, Categories).

General		Enterprise Managers		Partners		Categories		Workflow Options	
SetID:	SHARE	Catalog ID:	APPAREL	Outdoor Apparel					
Category Hierarchies		Customize Find View All 		First		1 of 1		Last	
Category Hierarchy ID	Category Hierarchy Name	View							
1	APPAREL 	Sports Apparel		View		+		-	
Go to Catalog Management Home									

Maintain Catalogs - Categories page

Category Hierarchy ID Select category hierarchies for this catalog.

View Click to view the selected hierarchy in a new browser window.

See Also

[Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Categories and Category Hierarchies, page 22](#)

Specifying Workflow Options

Access the Maintain Catalogs - Workflow Options page (Catalog Management, Catalogs, Maintain Catalogs, Workflow Options).

General Enterprise Managers Partners Categories **Workflow Options**

SetID: SHARE Catalog ID: APPAREL Outdoor Apparel

Catalog Notifications Customize | Find | [?] | [grid] First 1-7 of 7 Last

*Notification	Notification Method		
1 Loaded	E-mail only	+	-
2 Categorized	E-mail and Worklist	+	-
3 Offering_Categories Approval	E-mail only	+	-
4 Staged	E-mail only	+	-
5 Move to Production	E-mail only	+	-
6 Rolledback	E-mail only	+	-
7 Syndicated	E-mail only	+	-

[Go to Catalog Management Home](#)

Maintain Catalogs - Workflow Options page.

Notification

Select the stages of the process to notify users. The method of notification is displayed for each stage that you select. Default notification choices are already selected.

See Also

Chapter 4, "Setting Up PeopleSoft Catalog Management," Defining Default Workflow Notifications, page 20

Chapter 6

Importing Partner Source Files

This chapter provides an overview of the catalog source layouts and discusses how to:

- Define catalog source layouts.
- Define master catalog source layouts.
- Import source data.

Defining Catalog Source Layouts

To define the sources for catalog data use the Define Data Source (EOCM_REG_DATA_SRC) component.

This section provides an overview of data source types and discusses how to:

- Define the file format.
- Specify the file fields.

You can use sample files to assist you when defining the layout.

This step need only be performed once as long as the format of the partner's source files do not change. This step can be performed by either the partner or an enterprise catalog manager.

Note. Functionality to define shared master catalog sources and allow partners to define their own data sources exists.

Understanding Data Source Types

Catalog Management supports:

- Flat files
- xCBL
- CIF (Catalog Interchange Format) – Industry standard CSV file format from Ariba.
- CUP (Catalog Update Process) – Microsoft Access Database file from CommerceOne.

Catalog Interchange Format (CIF)

The field names on the Source Fields page of the catalog source will be defined based on the field names defined in the header section of the CIF file. If the field names have not been defined, Catalog Management will use the fields listed below:

Important! An error message will display when you attempt to upload a CIF file that does not have a .cif extension, CIF_I_V3.0 as the first row in the data file, or contains less than 12 columns of data.

Field Name	Field Type
Supplier ID	Character
Supplier Part ID	Character
Manufacturer Part ID	Character
Item Description	Character
SPSC Code	Character
Unit Price	Number with Decimal
Unit of Measure	Character
Lead Time	Number without Decimal
Manufacturer Name	Character
Supplier URL	Character
Manufacturer URL	Character
Market Price	Number with Decimal
Additional fields will be automatically created and named sequentially, starting with FIELD1, FIELD2, and so on.	Character

Catalog Update Process (CUP)

The CUP format is only supported if eProcurement is installed. eProcurement users will be required to use the ePro visual basic executable to export the CommerceOne Microsoft Access Database file to a flat file. The fields exported are predefined and positioned in the same order as the list below.

Note. You must export the Microsoft Access Database Products file, which contains both product and price information.

The field names are automatically created on the Source Fields page of the catalog source, and are disabled to prevent users from making changes.

Field Name	Field Type	Length
CUP_PartUpdateID	Number	10
CreateDate	Date	10
ActionCode	Character	5
Cup_SupplierPartnerID	Number	5
TPID	Character	50
TPName	Character	100
PartNum	Character	50
PartNumExt	Character	50
UOM	Character	12
UnitPrice	Number	10.5
MfrPartNum	Character	50
MfrName	Character	50
CatLevel1	Character	120
CatLevel2	Character	120
CatLevel3	Character	120
CatLevel4	Character	120
AcctLevel1	Character	2
AcctLevel2	Character	2
AcctLevel3	Character	2
AcctLevel4	Character	2
LeadTime	Number	11
CurrencyCode	Character	3
EffectiveDate	Date	10
QtyMin	Number	11
ShortDesc	Character	254

<i>Field Name</i>	<i>Field Type</i>	<i>Length</i>
LongDesc	Character	254

Pages Used to Define Catalog Source Layout

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Catalog Sources	EOCM_SOURCE_PAGE	Catalog Management, Catalog Management Home, Maintain Catalog Source Catalog Management, Catalogs, Maintain Catalog Sources	Choose to define either a catalog source or a master catalog source.
Define Catalog Source - Source Definition	EOCM_DATA_SRC_1	Catalog Management, Catalog Management Home Page, Maintain Catalog Source Select the Define Catalog Source link located on the Maintain Catalog Source page. Catalog Management, Catalogs, Maintain Catalog Sources Select the Define Catalog Source link located on the Maintain Catalog Source page.	Specify the file format to use to import the partner source catalog data.
Define Catalog Source - Source Fields	EOCM_DATA_SRC_2	Catalog Management, Catalog Management Home Page, Maintain Catalog Source, Define Catalog Source, Source Definition, Source Fields Catalog Management, Catalogs, Maintain Catalog Sources, Define Catalog Source, Source Definition, Source Fields	Specify the fields contained in the source file. Identify character qualifiers for particular fields and characters that should be stripped from the data.

Defining the File Format

Access the Maintain Catalog Sources - Source Definition page (Catalog Management, Catalogs, Maintain Catalog Sources, Source Definition).

Source Definition		Source Fields	
Partner ID:	1002	Trailblazers	Catalog Source: APP1002
Description:	Customer - Apparel 1002		Data Source Type <input checked="" type="radio"/> Flat File <input type="radio"/> CIF File <input type="radio"/> xCBL File <input type="radio"/> CUP File <input type="button" value="Upload Sample File"/>
Delimiter Type:	Comma		
*First Line:	Headings		
*Subsequent Lines:	Data		
Source Data Object:	APP1002		
Comment:	<input type="text"/>		
Created Datetime:	10/24/02 5:51PM	By:	CATADMIN
Last Update Datetime:	10/24/02 7:27:35PM	By:	ENTMGR_CUST
Go to Catalog Management Home			

Maintain Catalog Sources - Source Definition page

Partner ID and Catalog Source

These two values combined form a unique ID for the catalog source file.

Delimiter Type

Select the delimiter type used to separate each field value in this file. Choose from *Comma*, *Semi Colon*, *Space*, *Tab*, *Fixed Length*, *Other*. If *Other* is selected, a new field appears for you to enter the delimiter value, such as: % or \$.

If *Fixed Length* is selected, the Upload Sample File button is hidden, and the user must manually define the fields on the Maintain Catalog Sources - Source Fields page.

Note. You can select a value for flat files only. The field is disabled with the value *Comma* preselected for CIF and CUP files. The field is not visible for xCBL files.

First Line

Specify if the first line of the file contains headings or data.

If you select *Headings*, the values located in the first line of the uploaded sample file become the field names. If you select *Data*, the field names need to be added manually on the Maintain Catalog Sources - Source Fields page.

Note. You can select a value for flat files only. The field is disabled with the value *Headings* preselected for CIF files and *Data* preselected for CUP files. The field is not visible for xCBL files.

Subsequent Lines	<p>Specify if subsequent lines of the file contain data or nothing.</p> <p>Data is used for determining the field type and length from the sample file.</p> <hr/> <p>Note. You can select a value for flat files only. The field is disabled with the value <i>Data</i> preselected for CIF and CUP files. The field is not visible for xCBL files.</p> <hr/>
Source Data Object	<p>Enter a unique name, up to 30 characters. For example, use the partner ID and catalog source, such as 1001_OFFICESUPPLIES.</p> <p>This field creates a source data object for Data Transformer and is used as a source for the catalog map definition.</p>
Flat File, xCBL, CIF, or CUP	Select the file type.
By	Displays the user ID of the person who created or updated this catalog source.
Created Date Time and Last Update DateTime	Displays the date and time that this catalog source was created and updated.
Upload Sample File	<p>Click to upload a sample file. A page appears to enter the navigation path to the location of the sample file. Click Upload.</p> <p>The system reads the file and determines the format of the fields. When complete, the Maintain Catalog Sources - Source Fields page is displayed with the source field definitions.</p> <p>Alternatively, navigate to the Maintain Catalog Sources - Source Fields page and add rows to reflect the structure of the file.</p>

Specifying File Fields

Access the Maintain Catalog Sources - Source Fields page (Catalog Management, Catalogs, Maintain Catalog Sources, Source Definition, Source Fields).

Source Definition
Source Fields

Partner ID: 1002 Trailblazers
Catalog Source: APP1002

Source Fields
Customize | Find | View All | |

First
1-5 of 6
 Last

	*Field Name	Field Type	Field Length	Decimal Positions	Qualifier	Strip Characters		
1	OFFERING ID	Character	32					
2	OFFERING NAME	Character	64					
3	CATEGORY	Character	32					
4	UOM	Character	32					
5	PRICE	Number	10	5				

View Sample File

[Go to Catalog Management Home](#)

Maintain Catalog Sources - Source Fields page

Note. Source field information is automatically completed when the sample source file is uploaded. However, the information can be changed or entered manually.

Field Name

Enter the field name for each column of data.

This information is extracted from the first line of the sample file, if you indicated that the file contains headings.

Note. This field is read-only for xCBL files.

Field Type

Select the field type for each column of data. Choose from *Character*, *Date*, *DateTime*, *Number*, *Signed Number*, and *Time*.

Field Length and Decimal Positions

Enter the field length for each column of data. For number fields, include decimal positions.

Qualifier

Specify a character as a qualifier for a field.

For example, if the format of the file is comma-separated value (CSV), and the item description field contains data with embedded commas, it can be qualified by enclosing the data in quotes. In this case the " character is the qualifier. When the data is imported, the item description is imported with the embedded commas.

Strip Characters

Specify characters to strip from a field.

For example, if a price field has data starting with a \$ sign, the user specifies the \$ character in this field. During the import process, the \$ character is stripped from the price data. The user can specify multiple characters for each data field.

View Sample File

Select to view the sample file.

A new browser window opens with the content of the file.

Note. This button is hidden if the delimiter type is *fixed length*.

Attachments and Images

To utilize all the benefits of the attachments and images feature, you will need to define a catalog source layout with the addition of four new fields that must be mapped to these enterprise catalog fields:

- File Name.
- File Extension. (Image extensions can be BMP, RLE, GIF, JPEG, JPG, TIF, or PCX).
- File Path.
- URL. (Required if you are creating a link to the partner's website).

The following figure shows the fields in the partner source data file that contains the name of the attachment files, their extension names, and the path to their location.

CATALOG#	DESCRIPTION	UNSPSC CODE	UNSPSC DESC	FUM	VENDOR NAME	VENDOR CAT #	PRICE	Filename	Extension	Path	URL
300101	Tri Bike	42281000	Tricycles	EA	TOYS & BIKES	1815A	100.99	tricycle	JPG	attach/	http://www.onewheels.com
300101	Tri Bike	42281000	Tricycles	PR	TOYS & BIKES	1815A	200	tricycle	JPG	attach/	http://www.onewheels.com
200345	Child Bike	41121203	Bicycles	EA	TOYSR4U	430766	249.99	childbike	JPG	attach/	http://www.onewheels.com
200345	Child Bike	41121203	Bicycles	PR	ADVENTURES II	22 36 320 4	345.49	childbike	JPG	attach/	http://www.onewheels.com
100420	Mountain Bike	41121203	Bicycles	EA	ADVENTURES II	22 36 361 1	234.98	mtnbike	JPG	attach/	http://www.onewheels.com
100203	Mountain Bike	41122400	Road and Mount	EQ	RACERS	HX15997	523.5	mtnbike	JPG	attach/	http://www.onewheels.com
100336	Mountain Bike	41122400	Road and Mount	EA	DRAKES BIKES	5954	255	mtnbike	JPG	attach/	http://www.onewheels.com
100336	Mountain Bike	41122400	Road and Mount	PR	DRAKES BIKES	6212	322.75	mtnbike	JPG	attach/	http://www.onewheels.com
100190	Mountain Bike	41121203	Bicycles	EA	FAST WHEELS	1000 1L	234.98	mtnbike	JPG	attach/	http://www.onewheels.com
100650	Mountain Bike	41121203	Bicycles	PR	GO4IT	14000 100	543.55	mtnbike	JPG	attach/	http://www.onewheels.com

Sample partner source data file

To avoid duplicate entries, the system assigns the Vendor Item ID and UOM fields as pseudo key fields. To allow for the association of multiple attachments to a single offering, the system also assigns the field File Name as a pseudo key field.

When the catalog source layout is defined, import the partner source data file. No changes have been made to the import process. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Defining Master Catalog Source Layouts

This section provides an overview of master data source and map concepts, and discusses how to define master catalog sources.

Understanding Master Catalog Source and Map Concepts

Using one master catalog source layout and one related master catalog map for multiple partners allows customers to standardize the format that partners must use to transmit catalog offerings. In turn, a standardized format prevents customers from having to create and maintain several sources and map definitions, which can be very time-consuming and costly.

A master catalog source and related master map will provide the ability to:

- Share a master catalog source definition among multiple partners across catalogs.
- Share a master source data object with multiple partners.
- Share a master map definition.
- Use a unique catalog source and master map, for one or multiple partners.

Note. Functionality to allow partners to define their own catalog sources and map definitions also exists.

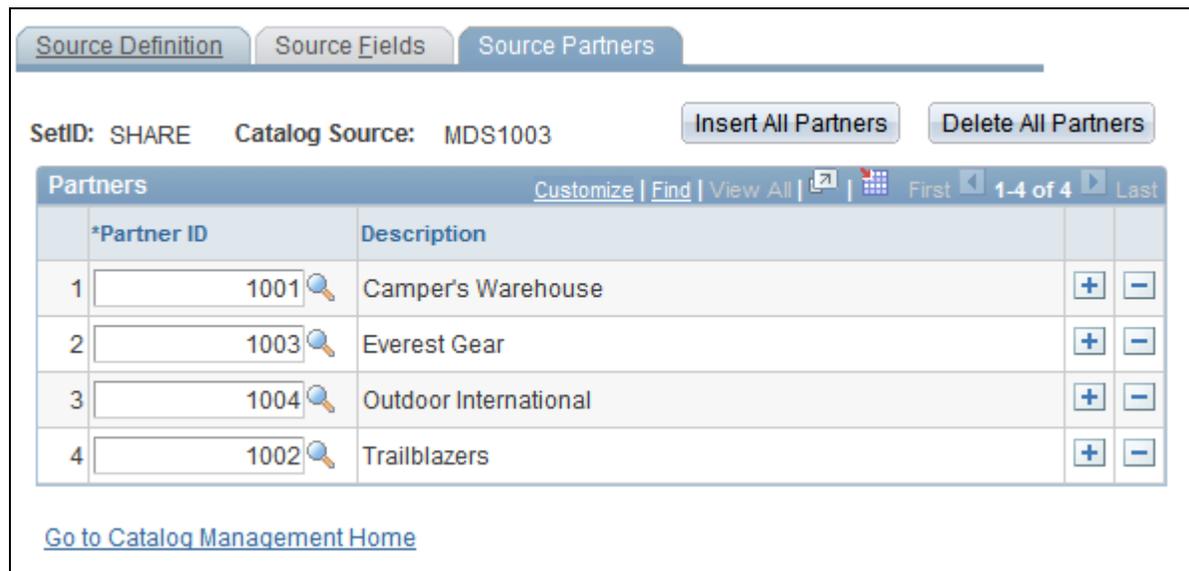
Pages Used to Define Master Catalog Sources

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Master Catalog Source - Source Definition	EOCM_DATA_MST	Catalog Management, Catalog Management Home Page, Maintain Catalog Source Select the Define Master Catalog Source link located on the Maintain Catalog Source page. Catalog Management, Catalogs, Maintain Catalog Sources Select the Define Master Catalog Source link located on the Maintain Catalog Source page.	Specify the file format to use to import the partner source catalog data.
Define Master Catalog Source - Source Fields	EOCM_DSMST_FLDS	Catalog Management, Catalog Management Home Page, Maintain Catalog Source, Define Master Catalog Source, Source Definition, Source Fields Catalog Management, Catalogs, Maintain Catalog Sources, Define Master Catalog Source, Source Definition, Source Fields	Specify the fields contained in the source file. Identify character qualifiers for particular fields and characters that should be stripped from the data.

Page Name	Definition Name	Navigation	Usage
Define Master Catalog Source - Source Partners	EOCM_DSMST_PRT	Catalog Management, Catalog Management Home Page, Maintain Catalog Source, Define Master Catalog Source, Source Definition, Source Partners Catalog Management, Catalogs, Maintain Catalog Sources, Define Master Catalog Source, Source Definition, Source Partners	Identify the partners that will share this master catalog source layout.

Defining Master Catalog Sources

Access the Source Partners page (Catalog Management, Catalogs, Maintain Catalog Sources, Define Master Catalog Source, Source Partners) for defining partners.



Source Partners page

The source definition page used to define a master catalog source, is similar to the source definition page used to define a catalog source for a single partner. The only difference is the way partners are associated to the source format. When defining a catalog source for a single partner the key fields are setID, partner ID, and Catalog Source. Values for these fields are entered on the Search page. When defining a master catalog source the key fields are setID and Catalog Source. Partners who will share this source format are identified on the Source Partners page.

To identify partners:

1. Go to the Source Partners page.

2. Add the partners that will share this source layout.

Click the Insert All Partners button to automatically add all partners registered in Catalog Management. Click Delete All Partners to remove all partners from the list.

3. Click Save to capture changes.

Importing Source Data

This section provides an overview of the source data import process and discusses how to:

- Import partner source data into Catalog Management.
- Import partner source data using a master catalog source.
- View and correct import errors.

Note. This activity can be performed by the partner if the partner has been granted privileges.

See Also

[Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37](#)

Understanding the Source Data Import Process

When a partner changes a source file, such as adding new offerings, deleting offerings, or updating prices, the catalog management business process flow cycle begins, starting with the process of importing the updated source file into a temporary table in Catalog Management. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Managing Errors

The system allows the import process to run to completion even if errors are encountered. The system captures the error information and presents the user with this set of options:

- Delete the error rows for a specified file.
- Delete all the imported data for a specific file.
- Export error rows to an external .txt file, correct the errors in this file, and then re-import the file by appending it to the previously imported data.

Pages Used to Import Source Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Import Catalog Sources	EOCM_IMPORT_PAGE	<p>Catalog Management, Catalog Management Home, Import Catalog Source</p> <p>Catalog Management, Catalogs, Import Catalog Source</p>	Choose to import either catalog sources or a master catalog source.
Import Catalog Sources	EOCM_DS_LOAD_1	<p>Catalog Management, Catalog Management Home, Import Catalog Source, Import Catalog Sources</p> <p>Select the Import Catalog Sources link located on the Import Catalog Sources page.</p> <p>Catalog Management, Catalogs, Import Catalog Sources, Import Catalog Sources</p> <p>Select the Import Catalog Sources link located on the Import Catalog Sources page.</p>	Import partner offering data from a partner source file.
Import Master Catalog Sources	EOCM_DS_LOAD_M	<p>Catalog Management, Catalog Management Home, Import Catalog Source, Import Catalog Sources</p> <p>Select the Import Master Catalog Source link located on the Import Catalog Sources page.</p> <p>Catalog Management, Catalogs, Import Catalog Source, Import Catalog Sources</p> <p>Select the Import Master Catalog Source link located on the Import Catalog Sources page.</p>	Import partner-offering data using a shared catalog source definition.

Page Name	Definition Name	Navigation	Usage
Import Status Details	EOCM_DS_STATUS_SEC	Catalog Management, Catalog Management Home Page, Import Catalog Source Catalog Management, Catalogs, Import Catalog Sources Click the Status link located on the Import Catalog Sources page.	View detail import process information for a particular file.
Data Source Import Error Detail	EOCM_DS_ERR_SEC	Catalog Management, Catalog Management Home Page, Import Catalog Source Catalog Management, Catalogs, Import Catalog Sources Click the View Errors button.	View details of errors that occurred during the import process.

Importing Partner Source Data Into PeopleSoft Catalog Management

Access the Import Catalog Sources page (Catalog Management, Catalogs, Import Catalog Sources).

Import Catalog Sources

Partner ID: 1002 Trailblazers Catalog Source: APP1002 Refresh

SeqNum	Attached File	Append	Status	Upload	View File	Import	View Errors	Rows Imported	Success Rows	Error Rows
1	Customer_Catalog_Offering_Sample_Data_-_Apparel_1002.csv	<input type="checkbox"/>	Imported	Upload	View File	Import	View Errors			

Add File

[Go to Catalog Management Home](#) [Process Monitor](#)

Import Catalog Sources page

This page shows the import history for the selected partner ID and catalog source. From this page you can view or delete previously imported data files, or add a new file to be imported.

Partner ID and Catalog Source

Values are based on the source layout you selected on the Import Catalog Sources Search page.

Append

Select to append additional files to the associated file.

Note. The check box will be disabled for files that have been imported successfully.

Status	<p>Click the link to go to the Import Status Details page and view more detail information about the status of the import process.</p> <p>See Chapter 6, "Importing Partner Source Files," Importing Partner Source Data Using a Master Catalog Source, page 55.</p>
Upload	<p>Click to upload the source file. Use the browse button to locate and select the desired file. Once selected, the path to the file is displayed. Click the Upload button to upload the file and return to the Import Catalog Sources page. The name of the selected file appears in the Attached File field, and the status of the file is <i>Uploaded</i>.</p> <hr/> <p>Note. The View File and Import buttons are now active.</p> <hr/>
View File	<p>Click to review the contents of the source file.</p>
Import	<p>Click to import the offering data into Catalog Management.</p> <p>A process request is submitted. Click the Process Monitor link to monitor the status of the request. The status of the file changes to <i>Imported</i> when the file has been successfully imported. Click the Refresh button to update the status.</p> <hr/> <p>Note. This button becomes inactive once the file has been imported.</p> <hr/>
View Errors	<p>If an error occurs, the status is updated to <i>Error</i> when you click the Refresh button. This button becomes active. Click to view and correct import errors.</p>
Rows Imported, Success Rows and Error Rows	<p>Displays the total number of rows imported, the number of rows imported successfully, and the number of rows that caused errors.</p>
Add File	<p>Click to add a new row. The next sequence number appears in the SeqNum field.</p>

Note. The import process leverages PeopleTools file attachments, which can be configured to use either the FTP or HTTP transfer protocol. File attachments are supported by using PeopleCode built-ins that implement the transfer of a file to or from a browser using the application server.

Import Status Details

Access the Import Status Details page (click the Status link on the Import Catalog Sources page).

Import Status Details			
Partner ID:	1002	Trailblazers	Catalog Source: APP1002
Sequence number	1		
Time Stamp:	10/24/2002 7:27:35PM	Last Update User ID:	ENTMGR_CUST
Attached File:	Customer_Catalog_Offering_Sample_Data_-_Apparel_1002.csv		
Rows Imported:	Success Rows:	Error Rows:	
Partner Version:	Catalog ID:		

Import Status Details page

Use the Import Status Details page to view more detailed import process information for the selected file.

See Also

[Chapter 6, "Importing Partner Source Files," Defining Catalog Source Layouts, page 41](#)

PeopleTools PeopleBook: PeopleCode Developer's Guide.

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Importing Partner Source Data Using a Master Catalog Source

The process of a master catalog source definition is similar to the process you use for importing partner-offering data using a catalog source definition for a single partner. The only difference is when you select the catalog source you want to import. In the master catalog source situation, the same catalog source may be listed multiple times in the search results.

To select a master catalog source to import:

1. Access the Import Catalog Sources page.
2. Click the Import Master Catalog Source link.

The Import Master Catalog Source search page appears.

3. Select the desired master catalog source file by setID, partner ID, and catalog source.

If multiple partners have been identified to share a specific master catalog source, that source file will be listed multiple times in the search results.

Viewing and Correcting Import Errors

Access the Data Source Import Error Details page (click the View Errors button on the Import Catalog Sources page).

Partner ID, Catalog Source and Sequence Number	Values are based on the information from the Import Catalog Sources page.
Line Number	Displays the row in the source file where the error occurred.
Field Name	Displays the name of the field that caused the error.
Text	Describes the error.
Delete Errors	Select to delete error rows from a specific imported file.
Remove Imported Data	Select to remove all the imported data from a specific file.
Export Error Data	Select to export the error rows to a flat file.

Note. Once exported, you make corrections, and then re-import the data using the Append Data feature. The corrected data will be appended to the rows that were imported successfully.

See Also

PeopleTools PeopleBook: PeopleCode Language Reference.

PeopleTools PeopleBook: PeopleCode Developer's Guide.

Chapter 7

Mapping, Transforming, and Loading Partner Source Data

This chapter discusses how to:

- Define catalog maps.
- Transform and load data.
- Remove partner versions.

Note. These activities, except defining master map information, can be performed by the partner if the partner has been granted privileges.

See Also

[Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37](#)

Defining Catalog Maps

To define catalog maps, use the Define Catalog Maps (EOCM_MAP_DFN) component.

This section provides an overview of the mapping process and master maps, and discusses how to:

- Define map information.
- Define map field detail.
- Perform map edits.
- Preview map results.

Note. This step need only be performed once as long as the format of the partner's source files or the enterprise target layout do not change.

Understanding the Mapping Process

Catalog mapping translates values from the catalog source data to the format of the enterprise catalog using default target values, transformations, translation sets, and map rules to facilitate the process. Although the majority of the data transformation setup and maintenance process is automated you may need to perform such tasks in Data Transformer before performing the tasks documented here for the Define Catalog Map component:

- Set up target field default values.
- Set up translation sets.
- Create transformations.
- Set up map rules.

Setting Up Target Field Defaults

The AutoMapper feature populates the map field details with the field value based on the target field. If Allow Map Override is not selected, you cannot override the field value at the map level. A default with no value is initialized to a blank, zero, or the appropriate PeopleSoft null value.

When setting the default values, consider the target field data type format. Character fields are used for names, codes, and letter values. Uppercase converts the field value to uppercase and signifies that no other formatting options apply to this field. Mixed case stores uppercase and lowercase characters as entered. Number fields and signed number fields are fixed in field length and allow the entry of positive numbers. Only signed numbers allow the entry of negative numbers. Date fields contain calendar dates. A date field has a field length of 10 and is maintained by the system. The default format of a date field is defined by the database and can be overridden by the browser settings.

Setting Up Translation Sets

You use translation sets to define equivalent values or a code set for data conversion, for example: EA = Each, GAL = Gallon, IN = Inch. The translation to and from values can be applied as a required rule to the map rule definition; the value is used by the AutoMapper feature based on a source input and target field in the map definition. If the value is not a required rule, you can select *Translation Set* when completing the map field details. Enter translation set values for map definition details, used as equivalent values for data transformation.

Creating Transformations

When data is copied from the source to the target, the data can be transformed using edits, lookups, or PeopleCode. Transformations allow you to change a column's value.

Note. Use the Data Transformer transformation wizard to guide you through the process of creating transformations.

Setting Up Map Rules

You can create rules to be used by the AutoMapper feature in the map field detail definition. You use rules to assign correct default values to target fields when creating maps. Using map rules, you can assign a literal default, transformation, source field, or a translation set to the target field. If the map rule is required, you cannot override the rule on the Define Catalog Map - Map Field Detail page.

Note. To access the Data Transformer Map Rules page, you need to update permissions for the delivered roles or assign additional roles.

See Also

PeopleTools PeopleBook: Security Administration.

Understanding Master Maps

Unlike defining map information for a single partner, defining master map information is performed at the enterprise catalog level. The pages used to enter the information are the same.

To associate the map to a master catalog source, the lookup you use to select a source data object on the Map Information page, is restricted to only source data objects created for master catalog source definitions. When the source data object is selected, the map is associated to a master catalog source as well as the partners identified to share the selected source.

Pages Used to Define Catalog Maps

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Define Catalog Map - Map Information	EOEW_MAP_DFN	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Information	Enter general mapping information.
Define Catalog Map - Map Field Details	EOEW_MAP_FLD	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Field Detail	Enter field-level mapping definitions.

Page Name	Definition Name	Navigation	Usage
Define Catalog Map - Map Edit	EOEW_MAP_EDIT	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Information	Edit map source input values used in transformation sets.
Define Catalog Map - Preview Map Results	EOEW_TARPREVIEW	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Preview Map Results	View a subset of the data based on the defined map.
Define Catalog Map - Comments	EOEW_MAP_COMMENT	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Define Catalog Map, Map Information, Comments	Enter comments related to this map definition.
Define Master Catalog Map - Map Information	EOEW_MAP_DFN	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Information	Enter general mapping information.
Define Master Catalog Map - Map Field Details	EOEW_MAP_FLD	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Field Detail	Enter field-level mapping definitions.
Define Master Catalog Map - Map Edit	EOEW_MAP_EDIT	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Information	Edit map source input values used in transformation sets.
Define Master Catalog Map - Preview Map Results	EOEW_TARPREVIEW	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Preview Map Results	View a subset of the data based on the defined map.

Page Name	Definition Name	Navigation	Usage
Define Master Catalog Map - Comments	EOEW_MAP_COMMENT	Catalog Management, Catalog Management Home Select an enterprise catalog. Define Master Catalog Map, Map Information, Comments	Enter comments related to this map definition.

Defining Map Information

Access the Define Catalog Map - Map Information page (Catalog Management, Catalog Management Home, Define Catalog Map, Map Information).

Map Information | Map Field Detail | Map Edit | Preview Map Result | Comments

Map Name: CCM_000000106

*Description: Procurement - Mountain 1002

Data Object

*Source: MOUNT1002 MOUNT1002

*Target: EOCM_EPRO_SCH Target Schema for ePro

Error Handling

No Error Handling Needed

Identify Error Row

Correct data error & reprocess

[Go to Catalog Management Home](#) [Go to Enterprise Console](#) [Go to Partner Console](#)

Define Catalog Map - Map Information page

Source

Select the source file for this map.

The source selected should be the name specified as the source data object when the catalog source layout was defined.

Target

Automatically populated based on the enterprise catalog selected when navigating to this page. The value cannot be overridden.

This value controls the target fields available on the Define Catalog Map - Map Field Details page.

Error Handling

Select from:

No error handling needed. Data validation is not performed and all rows are inserted into the target table.

Identify error row: Currently not available.

Correct data error & reprocess: Data validation is performed. Valid rows are inserted into the target table and invalid rows are inserted into a user-defined error table.

Note. The user-defined error table must be created by the system administrator in Application Designer before attempting to load the defined map.

See Also

Chapter 6, "Importing Partner Source Files," Defining Catalog Source Layouts, page 41

Defining Map Field Details

Access the Define Catalog Map - Map Field Detail page (Catalog Management, Catalog Management Home, Define Catalog Map, Map Field Detail).

The screenshot displays the 'Map Field Detail' page with the following sections:

- Map Information:** Map Object: CCM_000000106, Procurement - Mountain 1002
- Data Object:** Source: MOUNT1002, MOUNT1002; Target: EOCM_EPRO_SCH, Target Schema for ePro
- Error Handling:** No Error Handling Needed
- Map Field Details Table:**

Source Input Type	Source Prompt	Description	Target Field	Detail
Source	CURRENCY CODE		Currency Code	
Default	EFFDT	EFFDT	Effective Date	Default
Default	EFF_STATUS	EFF_STATUS	Status as of Effective Date	
Source	CATEGORY		Category Code	
Constant		1	Conversion Rate	
- Buttons:** Apply AutoMapper, Synchronize fields, Show/Hide Field Details
- Navigation:** [Go to Catalog Management Home](#), [Go to Enterprise Console](#), [Go to Partner Console](#)

Define Catalog Map - Map Field Detail page

To define map field details, click the Apply AutoMapper button.

AutoMapper automatically attempts to match the source to target field list. It also applies any required map rules, including target field defaults, translation set values, and transformations. AutoMapper then maps remaining target fields with constant values from the PSRECFIELD.DBFIELDNAME.SQL assembler, and coordinate the transformation steps.

If modifications to the mapping defined by AutoMapper is required, make changes to these options:

Source Input Type	<p>Select from:</p> <p><i>Source:</i> Select if the value is from the source file. You are prompted to select a source prompt field from the source file.</p> <p><i>Constant:</i> Select if the value is a constant value, then enter that value.</p> <p><i>Default:</i> Select to use a default value, then select a source prompt. Click the Default link to access the Set Target Field Default page.</p> <p><i>Transformation:</i> Select to use a transformation, then select a source prompt. Click the Transform link to view transformation definitions, or click the Add link to add a new definition using the Transformation wizard.</p> <p><i>Translation Set:</i> Select to use a translation set, then select a source prompt. Click the Translation link to view translation set values, or click the Add link to add a new set.</p> <hr/> <p>Important! If you select the Source Input Type of Source, the Source Prompt lookup will include EOCM_ACCESS_ID. Do not select as mapping is performed automatically for this field.</p> <hr/>
Source Prompt	Select a source prompt based on the source input type.
Description	Enter a description if you selected <i>Constant</i> as the input type.
Target Field	Lists the name of all the fields contained in the target file.
Details	Either the Transform, Default, or the Translation link appears, based on the selected input type.
Add	The Add link appears if the selected input type is either <i>Transformation</i> or <i>Translation Set</i> .

Performing Map Edits

Access the Map Edit page (Catalog Management, Catalog Management Home, Define Catalog Map, Map Edit).

Map Information	Map Field Detail	Map Edit	Preview Map Result	Comments
Map Name: CCM_000000106		Procurement - Mountain 1002		
Data Object				
Source:	MOUNT1002	MOUNT1002		
Target:	EOCM_EPRO_SCH	Target Schema for ePro		
Map Edits Customize Find View All First 1 of 1 Last				
	*Source Input Value	Detail	Add	
1	<input type="text"/>	Detail	Add	<input type="button" value="+"/> <input type="button" value="-"/>
Go to Catalog Management Home		Go to Enterprise Console		Go to Partner Console

Map Edit page

Select a new source input value to replace or add to the current source. Click the Detail link to access the Transformation Definition page and edit transformation definition information. Click the Add link to access the Transformation Definition page and add a new transformation.

Previewing Map Results

Access the Preview Map Results page (Catalog Management, Catalog Management Home, Define Catalog Map, Preview Map Results).

Click the Preview button to view a subset of mapped data based on the map definitions.

Note. Map results are only available to preview after the partner source file has been imported.

Transforming and Loading Data

This section provides an overview of the transformation and loading process and discusses how to transform and load offering data.

Understanding the Transformation and Loading Process

After a partner's offering data has been successfully imported into Catalog Management, it can be transformed into the enterprise catalog format and then loaded into the enterprise catalog.

The transformation of data is based on the catalog map that you defined for the partner's source file.

You can use three different methods to load offering data into the enterprise catalog:

- Incremental update.

The system updates the most recently loaded data. Required changes are made to existing data, such as price changes, and new offering data is added.

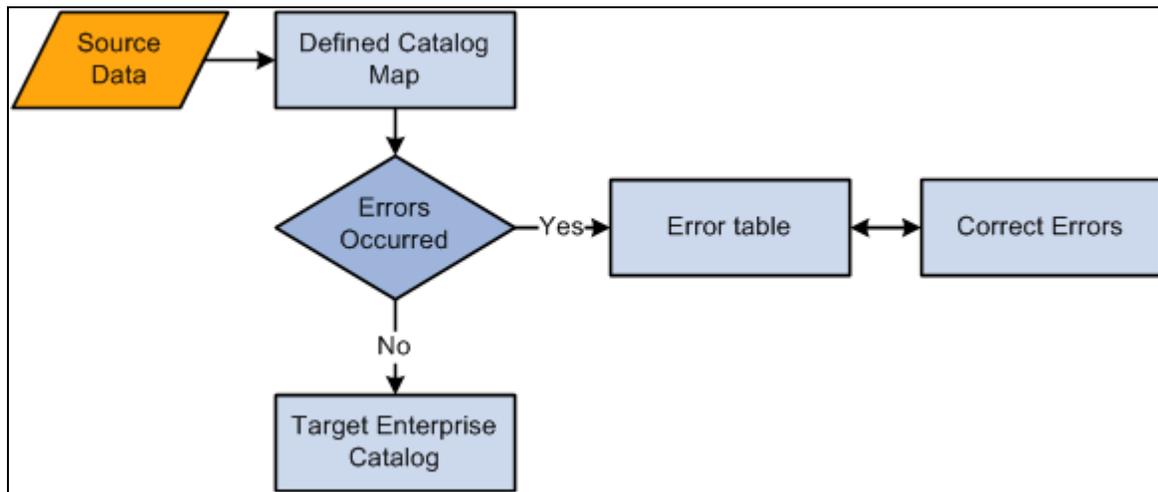
- Full load.

The system replaces the current data with the new data.

- Error recycle only.

If errors occurred during a previous attempt, this is the only option available. The system uses the data in the corrected error table as the source data.

The following diagram illustrates the transformation and loading process of source data to the target enterprise catalog.



Transformation and loading of source data

Note. The process of transferring and loading data from a shared catalog source to the enterprise catalog format, using a master data map is similar to transferring and loading data for a single partner. The only difference is when you select the catalog map object. The selection is restricted to master catalog maps associated to the selected partner.

See Also

[Chapter 7, "Mapping, Transforming, and Loading Partner Source Data," Defining Catalog Maps, page 57](#)

Pages Used to Transform and Load Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Load Catalog Map	EOCM_RUNMAP_PAGE	Catalog Management, Catalog Management Home. Select an enterprise catalog. Select a partner catalog. Load Catalog Map	Choose to load either a catalog map or a master catalog map.
Load Catalog Map	EOCM_RUN_ETL	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Load Catalog Map. Select the Load Catalog Map link located on the Load Catalog Map page.	Transform partner source data to enterprise catalog format based on the defined catalog map, and then load the newly formatted data to the enterprise catalog.
Load Catalog Master Map	EOCM_RUNMST_ETL	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Load Catalog Map. Select the Load Master Catalog Map link located on the Load Catalog Map page.	Transfer and load data from a shared catalog source to the enterprise catalog format using a shared data map.

Transforming and Loading Offering Data

Access the Load Catalog Map page (Catalog Management, Catalog Management Home, Load Catalog Map).

Load Catalog Map

User ID: ENTMGR_PRO

Run Control ID: RUN_MAP

Map Parameters

SetID: SHARE

Catalog ID: MOUNTAIN Mountaineering

Partner ID: 1002 Trailblazers

*Map Name

Target Load Option: Incremental Update ▼

[Go to Catalog Management Home](#)
 [Go to Enterprise Console](#)
 [Go to Partner Console](#)
 [Process Monitor](#)

Load Catalog Map page

Set ID and Catalog ID

Values are based on the enterprise catalog selected on the Catalog Management Home page.

The name of the enterprise catalog is displayed to the right of the catalog ID.

Partner ID

The value is based on the partner catalog selected on the Enterprise Catalog Console page.

The name of the partner source is displayed to the right of the partner ID.

Map Name

Select the catalog map defined for this partner source file.

Target Load Option

Select from:

- *Attachment Only.*
- *Error Recycle Only.*
- *Full Load.*
- *Incremental Update.*
- *Price Only*

Note. The *Error Recycle Only* option is available only if errors exist.

Run Map

Click to transform and load the offering data.

Note. A new version of the partner offering data is created once the transformation and load process has completed.

Using Attachment Only Target Load Option

An *Attachments Only* load give users the opportunity to add attachments to offerings that already exist in a staged or production version of the catalog without having to import, load, and categorize the offerings again. Attachments can also be associated to offerings using Maintain Partner Offerings.

If you have a different file format for updating attachments, you will need to create a new source definition and define a second catalog map to use when performing an *Attachments Only* load. At a minimum, this map definition must contain mapping information for the attachment and key fields. For example:

- Vendor Item ID.
- File Name.
- File Extension.
- File Path.

Note. An *Attachments Only* load can be performed only when the most recent version has a status of Staged or Production.

If you performed an *Attachments Only* load, the system will make a copy of the most recent partner version and increment the version by 1. For example, if the most recent version is version 5, the system copies that version to version 6. The system will then update offerings with the new attachments using the key fields to match offerings. The system will ignore offerings that have no match. The new version is automatically staged.

Using Price Only Target Load Option

A *Price Only* source data load give users the opportunity to update price fields for offerings that already exist in a staged or production version of the catalog without having to import, load, and categorize the offerings again.

If you have a different file format for updating prices, you must create a new source definition and define a second catalog map to use when performing a *Price Only* load. At a minimum, this map definition must contain mapping information for the prices and the key fields. For example:

- Vendor Item ID.
- Unit of Measure.
- Vendor Price.

Note. A *Price Only* load can be performed only when the most recent version has a status of staged or production. If the most recent version does not have a status of staged or production, the only available target load options will be *Full Load* or *Incremental Update*.

When you perform a *Price Only* load, the system will make a copy of the most recent partner version and increment the version by 1. For example, if the most recent version is version 5, the system copies that version to version 6. The system will then update offerings with the new prices using the key fields to match offerings. The system will ignore offerings that have no match. The new version is automatically staged.

See Also

[Chapter 2, "Understanding PeopleSoft Catalog Management," Creating Versioning, page 9](#)

Removing Partner Versions

This section provides an overview of the removal process and discusses how to remove unused partner versions.

Understanding the Removal Process

Catalog Management allows catalog managers and partners to load and maintain several different versions of a partner's data. Once a version is selected for production, all other versions are stored but not used again. The remove Unused Versions feature provides a way for the catalog manager to remove these unused partner versions.

Important! Remove means deleting all the partner data. Once removed, the partner version cannot be retrieved.

Page Used to Remove Unused Partner Versions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Remove Versions	EOCM_VER_REM	Catalog Management, Catalog Management Home. Select an enterprise catalog. Select a partner catalog. Remove Unused Versions.	Delete all the data for the selected partner version and clean up all the records that point to that partner version.

Removing Unused Partner Versions

Access the Remove Versions page (Catalog Management, Catalog Management Home, Remove Unused Versions, Remove Versions).

Remove Versions

SetID: SHARE

Catalog ID: MOUNTAIN Mountaineering

Partner ID: 1002 Trailblazers

Note: Partner data associated with the removed version cannot be retrieved

All Versions Unused Versions

Versions Customize Find View All First 1 of 1 Last					
	Partner Version	Load State	Catalog Version	Last Update Date/Time	Last Update User ID
<input type="checkbox"/>		1 Production		1 10/24/02 6:48:53PM	ENTMGR_PRO

[Go to Catalog Management Home](#) [Go to Enterprise Console](#) [Go to Partner Console](#) [Process Monitor](#)

Remove Versions page

SetID and Catalog ID Values are based on the enterprise catalog selected on the Catalog Management Home page

Partner ID Value is based on the partner catalog selected on the Enterprise Console.

All Versions or Unused Versions Select *All Versions* to list all versions of partner data for this partner. Select *Unused Versions* to list only those versions that are no longer used (Default).

Versions Displays a list of partner versions based on the previous selection, including these options:

- Partner Version.
- Load State. For example, *Loaded, Categorized, Staged, Production*.
- Catalog Version.
- Last Update Date/Time.
- Last Update User ID.

Select

Select the associated check boxes to select the partner versions you want to remove. The check box will be disabled for:

- Version that has been moved to production.
- Currently staged version.
- Latest version.

Remove Versions

Click to run the application engine EOCM_REM_VER process. The process is submitted. Click the Process Monitor link to monitor the status of the request.

Note. Once removed, the partner version cannot be retrieved.

Chapter 8

Categorizing Offering Data

This chapter provides an overview of configurable categorization and the categorization process and discusses how to:

- Create categorization rules.
- Define category substitutions.
- Categorize offerings.
- Review categorization results.
- Approve proposed categories and catalog offerings.

Understanding Configurable Categorization and the Categorization Process

With categorization, you associate partner offerings to catalog offerings, and group them into enterprise catalog categories. Configurable categorization improves the probability of automatically matching a partner's offering to an enterprise offering, and also the probability of automatically matching a partner's category to an enterprise category.

With configurable categorization, you can choose the fields used for matching partner offerings to catalog offerings, and also create rules based on those fields. Each rule can contain multiple conditions and can be applied to several partner catalogs across the same catalog type. It can also be specific to one partner catalog.

Category substitutions automatically match partner categories with enterprise categories, based on user-defined substitute categories. For example, the enterprise category Notebook Computers always matches the partner category Laptops. This feature can be used when you know that partners suggest certain categories and you want them matched with specific enterprise categories.

When reviewing categorization results, you can:

- Manually associate partner offerings to catalog offerings.
- Propose new catalog offerings when no association exists.
- Update partner offering information.
- Manually associate proposed new catalog offerings to catalog categories.
- Propose new categories when there is no match with existing catalog categories.

Note. The above activities, with the exception of creating rules and defining substitutions, can be performed by partners if they have been granted privileges.

After the categorization review process is complete, the offering assignments are ready to be approved by the enterprise catalog manager, and the partner catalog can be staged for inclusion in the next production version of the enterprise catalog.

Creating Categorization Rules

To create categorization rules, use the Maintain Categorization Rules (EOCM_CAT_RULE) component.

You use categorization rules to map between partner offerings and the business categories.

Pages Used to Create Categorization Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Categorization Rules	EOCM_CAT_RULE	Catalog Management, Catalog Management Home, Maintain Categorization Rules	Create and maintain rules, made up of conditions in priority order, for the categorization process.

Creating Rules

Access the Maintain Categorization Rules (Catalog Management, Catalog Management Home, Maintain Categorization Rules).

Maintain Categorization Rules

Categorization Rule ID: OFF_DEF Set as Default
 Categorization Rule Name:
 Description:
 Catalog Type:

Conditions for matching Partner Offerings [Customize](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Priority	*Categorization Field		Categorization Field		
<input type="text" value="1"/>	<input type="text" value="Manufacturing ID"/>	<input type="text" value="ANC"/>	<input type="text" value="Manufacturing Part Number"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="2"/>	<input type="text" value="Vendor Item Description"/>	<input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

Conditions for matching Catalog Categories [Customize](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Priority	*Categorization Field		
<input type="text" value="4"/>	<input type="text" value="Category Code"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="2"/>	<input type="text" value="Category Description"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

[Go to Catalog Management Home](#)

Maintain Categorization Rules page

Catalog Type

Select the catalog type for this rule.

Note. The categorization fields available to create rule conditions are based on the catalog type and the fields selected on the Installation Options - Categorization page.

Set as Default

Select to use the rule as the default for the categorization process.

This selection overrides any previous selection. Only one default per catalog type is allowed.

Priority

Define the priority order. The system automatically prioritizes the conditions by the order entered. You can reorder the conditions. The system reads the priority order from low to high. Gaps in the numbering sequence are acceptable.

Categorization Field

Select a field for the condition.

- Operator** (Optional) Select a logical operator. Required to add an additional field to the condition.
-
- Note.** Currently, *And* is the only option available. When you link two fields with *And*, an offering is considered a match only if both the first and second field match.
-
- Only one categorization field is permitted for catalog category conditions.
- Categorization Field** (Optional) Select a second field for the condition.

Relating Multiple Conditions

When a rule includes multiple conditions, PeopleSoft automatically links them using the OR operator. When two conditions are linked with OR, an offering is considered a match if the first or the second condition matches, not necessarily both. The conditions are evaluated in priority order, and as soon as one condition is satisfied, processing is complete for that offering.

See Also

Chapter 4, "Setting Up PeopleSoft Catalog Management," Selecting Fields for Categorization Rules, page 20

Defining Category Substitutions

To define category substitutions, use the Translate (EOCM_TRANSLATE) component.

You use category substitutions when you know partners suggest certain categories and you want those categories replaced with internal categories.

Pages Used to Define Category Substitutions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Categorization Substitutions	EOCM_TRANSLATE	Catalog Management, Catalog Management Home, Maintain Categorization Substitutions	Create and maintain substitutions for the categorization process.

Defining Substitutions

Access the Maintain Categorization Substitutions page (Catalog Management, Catalog Management Home, Maintain Categorization Substitutions).

Maintain Categorization Substitutions

Categorization Substitution ID: OFFICE Set as Default

Substitution Name:

Description:

Substitutions for Categorization			Customize	View All	First	1-4 of 4	Last
Source Category (like)	Target Category	Category Name					
<input type="text" value="Laptops"/>	<input type="text" value="43171801"/>	Notebook computers		<input type="button" value="+"/>	<input type="button" value="-"/>		
<input type="text" value="Colored pencils"/>	<input type="text" value="44121709"/>	Crayons		<input type="button" value="+"/>	<input type="button" value="-"/>		
<input type="text" value="Pen sets"/>	<input type="text" value="44121702"/>	Pen or pencil sets		<input type="button" value="+"/>	<input type="button" value="-"/>		
<input type="text" value="Desks"/>	<input type="text" value="56101700"/>	Office furniture		<input type="button" value="+"/>	<input type="button" value="-"/>		

[Go to Catalog Management Home](#)

Maintain Categorization Substitutions page

Substitution Name

Enter a name for this substitution set.

Note. Categorization Substitution ID and Substitute Name are the only fields available on the Search page.

Set as Default

Select to use the substitution set as the default for the categorization process.

This selection overrides any previous selection. Only one default per catalog type is allowed.

Source Category

Enter the partner category name. This is a free text field with no validation. The system finds categories that are very similar to the value entered. For example, if you enter *color pencils*, the system also finds *colored pencils* and *coloring pencils*.

Target Category

Select a category from the enterprise catalog. All partner offerings within the source category are grouped under the target category.

Categorizing Partner Offering Data

You use the Categorize Offerings page to review data and run the categorization process.

Note. At this stage of the process, you can only see offering data belonging to the selected partner. Categorization is the last step in preparing the data for consolidating with offerings from other partners.

Pages Used to Categorize Partner Offering Data

Page Name	Definition Name	Navigation	Usage
Categorize Offerings	EOCM_CATEGORIZE	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Categorize Offerings	Review Run Catalog Map process (EOCM_RUN_MAP) results and launch the categorization process.

Categorizing Partner Offerings

Access the Categorize Offerings page (Catalog Management, Catalog Management Home, Categorize Offerings).

Categorize Offerings

SetID: SHARE

Catalog ID: MOUNTAIN Mountaineering

Partner ID: 1002 Trailblazers

Version: 1

Categorization Rule ID: [View Rule](#)

Categorization Substitution ID: [View Substitution](#)

Max Rows: 1 to 38 of 38

Item ID	Item Description
AXE	Ice Axe
AXE-LW	Lightweight Ice Axe
BDYHRN	Body Harness
BNCL-CMP1025	Compact 10x25 Binoculars
BNCL-WP1025	Waterproof 10x25 Binoculars
BNCL-WP825	Waterproof 8x25 Binoculars
CHKBG-LG	Large Chalk Bag
CHKBG-MD	Medium Chalk Bag

Categorize Offerings page: Offering Info tab

Categorization Rule ID Select a rule.
 If a rule has been set as the default, it is already selected.

View Rule	Click to view the details of the selected rule in a new browser window.
Categorization Substitution ID	Select a substitution set. If a substitution set has been set as a default, it is already selected.
View Substitution	Click to view the details of the selected substitution set in a new browser window.
Max Rows (maximum rows)	Enter the maximum number of rows, no greater than 300, to display in the grid. Use the arrows to page up, page down, go to end, or go to beginning. The rows currently in the grid and the total number of rows are also displayed.
Offering ID and Offering Description	Displays the offering description and ID. If a partner offering is not mapped to a catalog offering ID, the offering ID and offering description fields are blank, and values are assigned during categorization. If they are mapped, then new catalog offerings are created with the mapped offering ID and description, providing no association is found between the partner offering and catalog offerings.

Partner Offering Info Tab

Select the Partner Offering Info tab (select the Partner Offering Info tab on the Categorize Offerings page).

Categorize Offerings

SetID: SHARE

Catalog ID: MOUNTAIN Mountaineering

Partner ID: 1002 Trailblazers

Version: 1

Categorization Rule ID: [View Rule](#)

Categorization Substitution ID: [View Substitution](#)

Max Rows: 300 1 to 38 of 38

Partner Offerings					
Offering Info		Partner Offering Info			
Item ID	Vendor Item Description	Vendor Item ID	Unit Of Measure	Vendor Price	Currency Code
AXE	Ice Axe	AXE	EA	30.00000	USD
AXE-LW	Lightweight Ice Axe	AXE-LW	EA	40.00000	USD
BDYHRN	Body Harness	BDYHRN	EA	15.00000	USD
BNCL-CMP1025	Compact 10x25 Binoculars	BNCL-CMP1025	EA	42.50000	USD
BNCL-WP1025	Waterproof 10x25 Binoculars	BNCL-WP1025	EA	85.00000	USD
BNCL-WP825	Waterproof 8x25 Binoculars	BNCL-WP825	EA	115.00000	USD
CHKBG-LG	Large Chalk Bag	CHKBG-LG	EA	10.00000	USD
CHKBG-MD	Medium Chalk Bag	CHKBG-MD	EA	8.00000	USD
CMP-DG	Digital Compass	CMP-DG	EA	32.00000	USD

Categorize Offerings page: Partner Offering Info tab

Partner offerings are listed using the field names based on the catalog type. Additional fields reflecting the status of the offerings are described below.

Verify that all offerings listed in the source file are listed here, and that the mapping of the original data is correct.

Note. The total number of offerings is displayed above the grid. For example, 1 to 300 of 3000.

Offering Status

Offering status can be one of these options:

- *Loaded:* Run Catalog Map process (EOCM_RUN_MAP) has been performed, and offerings are ready to be categorized.
- *Categorized:* The categorization process has been run.
- *Staged:* The selected partner's offerings have been consolidated with the offerings from the enterprise's other partners.

Offering State	<p><i>New:</i> This offering has never been offered by this partner.</p> <p><i>Updated:</i> This offering already exists for this partner, but the data has changed.</p> <p><i>Unchanged:</i> There is no change to this offering compared to when it was loaded in a prior version.</p> <p><i>Deleted:</i> This offering was included in a prior load, but is marked as <i>Inactive</i> in the current load.</p>
Message Text	Blank until categorization is run.
Run Categorization	<p>Click to run the categorization.</p> <p>A process request is submitted. Click the Process Monitor link to monitor the status of the request.</p> <hr/> <p>Note. If the offering status of the selected partner's offerings version is either <i>Staged</i> or <i>Production</i> the Run Categorization button is not displayed.</p> <hr/>

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Reviewing Categorization Results

This section discusses how to:

- Review categorization results.
- Update partner offering details.
- Update proposed offering categories.
- Update catalog offering categories.
- Choose partner offering categories.
- Revalidate partner offerings.

Important! Changes made to partner offerings should also be made in the partner's catalog source file. This prevents the same errors, rejections, and so forth from occurring again.

Common Elements Used in This Section

Offering ID	The enterprise catalog's offering ID for the selected offering. The offering description is displayed to the right.
--------------------	---

Primary Category

Select the check box associated with the category that you want as the primary category.

If only one category exists, the check box is automatically selected.

Note. For procurement catalogs, the primary category is the category used with Supply Chain Management.

Pages Used to Review Categorization Results

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review Categorization Results	EOCM_REPAIR2	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results	Review and update offerings and their associated categories.
Partner Offering Detail	EOM_GENDTL_SEC	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Select Partner Offerings.	Manually update the partner offering detail record.
Proposed Offering Details	EOCM_NEWOFF_DTLS	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Select Proposed Offerings	Assign proposed new offerings to categories.
Catalog Offering Details	EOCM_OFFER_DTLS	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Select Catalog Offerings.	Assign catalog offerings to categories.

Page Name	Definition Name	Navigation	Usage
Choose Category	EOCM_CHOOSSECAT	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Review Categorization Results Click Assign Offerings to Category.	Assign proposed new catalog offerings to categories using the category hierarchy tree.

Reviewing Categorization Results

Access the Review Categorization Results page (Catalog Management, Catalog Management Home, Review Categorization Results).

Review Categorization Results

Catalog ID: MOUNTAIN Mountaineering Partner ID: 1002 Trailblazers Version: 1

[View by Category](#) [View by Status](#) Partner Offerings: 0

Left | Right

- All Partner Offerings
- New Partner Offerings
- Updated Partner Offerings
- Unchanged Partner Offerings
- Deleted Partner Offerings
- Uncategorized Partner Offering
- Error Partner Offerings
- Rejected Partner Offerings

Max Rows: 300

Partner Offerings

[Proposed Offerings](#) [Uncategorized Offerings](#) [Rejected Offerings](#) Max Rows: 300

Proposed Catalog Offerings

Catalog Offerings Max Rows: 300

Item ID	Item Description	Details
<input type="checkbox"/>		Details

Assign Partner Offerings to Offerings Revalidate Partner Offerings

[Go to Catalog Management Home](#) [Go to Enterprise Console](#) [Go to Partner Console](#) [Process Monitor](#)

Review Categorization Results: View by Status page

View By Status

Click View by Status link to display status types as links. When you select a status, the number of partner offerings associated with that status appears to the right of the View by Status link.

The following table lists the different status types and the action that can be taken:

Status	Description	Action
All	Shows all partner offerings.	Review categorization summary results.
New	<p><i>Incremental Load:</i> Offerings that are new for this partner.</p> <p><i>Full Load:</i> Previous load version is overwritten so all offerings will be considered new.</p>	<p>Review the category and catalog offering association.</p> <p>Associate partner offerings to existing catalog offerings as necessary.</p>

Status	Description	Action
Updated	Offerings that have been changed since the previous load version.	Review partner offering updates and associations.
Unchanged	Offerings that have no changes between this load and the previous load version.	Review partner offerings associations.
Deleted	Offerings that are marked <i>Inactive</i> in the current load, but existed in a previous load version.	Verify that these partner offerings are no longer offered.
Uncategorized	Offerings with no category assigned.	Assign partner offerings to existing catalog categories.
Error	Offerings that contain errors.	Determine and correct errors.
Rejected	Proposed catalog offerings that were rejected during the approval process.	Reassign partner offerings to existing catalog offerings.

The following three grids are displayed in a collapsed state below the status links. Only the partner offerings associated with the selected status appear in the grids:

- Partner Offerings.
- Proposed Offerings.
- Catalog Offerings.

View By Status: Partner Offerings Grid

The Partner Offerings grid contains information about the partner offerings after categorization. The Offering Info section includes a Detail link for each partner offering listed. This link is used to update offering information.

To assign one or more partner offerings to a proposed or enterprise catalog offering:

1. Select the check box for each partner offering to assign.
2. Go to either the Catalog Offerings grid or the Proposed Offerings grid and select the check box associated with the catalog offering to associate to the selected partner offerings.

Note. To prevent the selection of more than one catalog offering, the check boxes associated with the remaining catalog offerings are inactive.

- Click the Assign Partner Offerings to Offerings button.

Note. Refresh the page to view assignments.

You can also review the message text generated by the categorization process for all partner offerings. The following table lists the messages that can be generated:

<i>Message Text</i>	<i>Description</i>
Partner Offering Found.	Matches the existing partner offering.
Catalog Offering Found.	Matches the catalog offering.
Catalog Offering Name/Partner Offering Name Missing.	Error: Catalog and partner offering names are required.
Category Found	Partner offering category matches the catalog category.
New Offering/Category	<p>Either the partner offering, the category it is assigned to, or both, do not exist in the enterprise catalog.</p> <p>Note. Although an offering may be new for this partner, it still exists in the enterprise catalog if it is offered by another partner.</p>
Duplicate Offering ID/Unit of Measure/EFFDT	Error: Duplicate partner offerings in this load.
No Offering ID	Error: Catalog offering ID is missing.
Duplicate Offering ID	Error: Duplicate Catalog offering ID.

View By Status: Proposed Catalog Offerings Grid

The Proposed Catalog Offerings grid is not populated until a status is selected and one of these links, located above the title bar, is selected:

- Proposed Offerings.

The grid is populated with proposed catalog offerings that currently do not exist in the catalog for the selected status. For example, no other partner offers this offering.

For each offering listed, the system automatically generates an offering ID and copies the vendor description to the offering description.

- Uncategorized Offerings.

The grid is populated with proposed catalog offerings that have no category provided.

Click the Detail link associated with each proposed catalog offering to access the Proposed Offering Details page and assign a category.

- Rejected Offerings.

The grid is populated with proposed new catalog offerings that were rejected during the approval process.

Move the associated partner offerings to catalog offerings.

Note. When the Stage Partner Offerings (EOCM_STAGE) process is run, only approved partner offerings are staged.

View By Status: Catalog Offerings Grid

The Catalog Offerings grid is not populated until a status is selected and the Catalog Offerings link, located above the title bar, is selected. The grid is populated with all catalog offerings currently in the catalog.

Click the Detail link associated with each catalog offering to access the Catalog Offering Details page and review or remove assigned categories, and assign additional categories.

Results By Category

Access the Review Categorization Results page. Click the View by Category link.

View categorization results by category to verify if partner offerings have been assigned to the correct categories. As each category within a group is highlighted, the number of partner offerings, catalog offerings, and proposed catalog offerings contained in that category are displayed to the right. You can use the Find Category feature to search for a specific category within the hierarchy.

See [Chapter 4, "Setting Up PeopleSoft Catalog Management," Creating Category Hierarchies, page 24.](#)

You can review offerings by these groups:

- Catalog categories.

Use the folder icons to navigate through the enterprise catalog's category hierarchy. The number of offerings contained in each category appears as the category is selected.

Note. Only the number of offerings contained in the highlighted category are counted. For instance, the number of offerings displayed for a parent category does not include the number contained in its child categories.

- Proposed categories.

Review offerings that are assigned categories that do not exist in the enterprise catalog and are proposed to be included.

- Unknown category.

Review all offerings that have no category assigned.

- Rejected categories.

Review offerings that are assigned to categories that were rejected during the approval process.

See Also

[Chapter 8, "Categorizing Offering Data," Categorizing Partner Offering Data, page 77](#)

Updating Partner Offering Details

Access the Partner Offering Details page (select Partner Offering Details in Review Categorization Results page). The Partner Offering Details page contains the original data as proposed by the partner.

Partner Offering Details	
Item ID:	<input type="text" value="CMP-DG"/>
Item Description:	<input type="text" value="Digital Compass"/>
Effective Date:	<input type="text" value="10/24/2002"/>  Status: <input type="text" value="A"/> 
Vendor Item Description:	<input type="text" value="Digital Compass"/>
Vendor Item ID:	<input type="text" value="CMP-DG"/>
Unit Of Measure:	<input type="text" value="EA"/>
Category Description:	<input type="text" value="COMPASSES"/>
Category Code:	<input type="text" value="COMPASSES"/>
Vendor Price:	<input type="text" value="30.00000"/>
Currency Code:	<input type="text" value="USD"/>

Partner Offering Details page

Update detail information for the selected partner offering. All field values, except the offering ID and description, can be updated.

The fields that appear are based on the enterprise catalog type.

Click OK to save changes and return to the Review Categorization Results page.

Note. Remember to update the partner source file with any changes made to offering detail information.

Updating Proposed Offering Categories

Access the Proposed Offering Details page (select Proposed Offering Details in Review Categorization Results page).

This page is used to:

- Propose a new category.

- Remove a proposed new category and assign an existing category.
- Add additional categories.
- Change the primary category.

Category ID, Category Name and **Category Code** Displays one or more of these options:

- Category information of a proposed new category.
- Category information of a matched enterprise catalog category.
- No information.

Updating Catalog Offering Categories

Access the Catalog Offering Details page (select Catalog Offering Details in Review Categorization Results page).

Catalog Offering Details

Catalog ID: MOUNTAIN Mountaineering

Offering ID: AXE Ice Axe

Categories						Customize	Find	View All	First	1 of 1	Last
Category ID	Category Name	Category Code	Primary Category								
1	AXES	Ice Axes	<input checked="" type="checkbox"/>	<input type="text"/>							

Catalog Offering Details page

Associate an existing catalog category with the selected catalog offering.

Choosing Partner Offering Categories

Access the Choose Category page (click Assign Offerings to Category in Review Categorization Results page).

Choose Category

Catalog ID:	MOUNTAIN	Mountaineering	
Partner ID:	1001	Camper's Warehouse	Version: 1

Left | Right

- 📁 [Catalog Categories](#)
 - 📁 [MOUNTAIN - Mountaineering](#)
 - + [CLIMBING EQUIP - Climbing Equipment](#)
 - + [HIKING EQUIP - Hiking Equipment](#)
 - + [SNOW GEAR - Snow Gear](#)
 - + [SNOW SPORTS EQUIP - Snow Sports Equipment](#)
- 📁 [Proposed Categories](#)
- 📁 [Unknown Category](#)
- 📁 [Rejected Categories](#)

Choose Category page

Select the appropriate category group and navigate to the category you want to assign to the selected offering. Click OK.

Revalidating Partner Offerings

When you revalidate partner offerings, you run the validation (EOCM_REVALID) process to detect any errors that may have resulted from updating partner data. Review the initial categorization results completely before revalidating.

Once you have completed the review and all the required adjustments are made, click Revalidate Partner Offerings. A process request is submitted. Click the Process Monitor link to monitor the status of the request. When it has the process has completed successfully, return to the Review Categorization Results page to once again review results. When you are satisfied, the partner offerings are ready for approval.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Approving Categorization Results

The enterprise catalog manager is responsible for approving, or rejecting proposed categories and proposed catalog offerings based on categorization results.

Pages Used to Approve Categorization Results

Page Name	Definition Name	Navigation	Usage
Approve Proposed Categories and Catalog Offerings	EOCM_APPROVE	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Approve Proposed Categories and Catalog Offerings	Approve (or reject) proposed categories and catalog offerings.

Approving Proposed Categories and Catalog Offerings

Access the Approve Proposed Categories and Catalog Offerings page (Catalog Management, Catalog Management Home, Approve Proposed Categories and Catalog Offerings).

Approve Proposed Categories and Catalog Offerings

Catalog ID: MOUNTAIN Mountaineering Partner ID: 1003 Everest Gear Version: 1

[Select All](#) [UnSelect All](#)

Proposed Categories
Customize | Find | View All | First 1 of 1 Last

Reject	Category ID	Category Name	Category Code	Category Hierarchy ID
<input type="checkbox"/>				MOUNTAIN <input style="width: 50px;" type="text"/>

Max Rows: 0 to 0 of 0

Proposed Catalog Offerings
Customize | Find |

Reject	Offering ID	Offering Name	Categorized
<input type="checkbox"/>			<input type="checkbox"/>

Approve Proposed Categories and Catalog Offerings page

Approve Offerings/Categories Click to approve all new categories and catalog offerings that are not marked for rejection.

A process request is submitted. Click the Process Monitor link to monitor its status. Once it has completed successfully, you can return to the Approval page. Only the categories and catalog offerings that were initially rejected are listed.

Proposed Categories

Category Hierarchy

Select a hierarchy.

The category is added to the root level of the category hierarchy.

Note. If no hierarchy is selected, the category will be approved, but will not appear on any hierarchy.

Reject

Select to reject a category. Rejected categories do not become part of the enterprise category hierarchy. You cannot browse associated partner offerings by this category.

Proposed Catalog Offerings

Lists all the proposed new catalog offerings.

Select the Reject check box located to the left of each catalog offering to reject. Rejected catalog offerings and associated partner offerings are not in the current enterprise catalog. To include partner offerings, they need to be assigned to existing enterprise catalog offerings.

Chapter 9

Staging and Browsing Partner Offerings

This chapter provides an overview of browsing and selecting partner offerings and discusses how to:

- Stage partner offerings.
- Browse staged offerings.

Staging Partner Offerings

The staging process indicates that a partner's offerings and associated categories have been approved by the enterprise catalog manager and are ready to be included in the current version of the enterprise catalog. The staging process consolidates selected partner offerings with the offerings from the enterprise's other partners.

Page Used to Stage Partner Offerings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Stage Partner Offerings	EOCM_LOAD_NEW	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Stage Partner Offerings	Consolidate partner offerings and indicate that they are ready to be included in the enterprise catalog.

Staging Partner Offerings

Access the Stage Partner Offerings page (Catalog Management, Catalog Management Home, Stage Partner Offerings).

Stage Partner Offerings

SetID:	SHARE	
Catalog ID:	MOUNTAIN	Mountaineering
Partner ID:	1002	Trailblazers
Version:	1	

Stage Partner Offerings

[Go to Catalog Management Home](#)
 [Go to Enterprise Console](#)
 [Go to Partner Console](#)
 [Process Monitor](#)

Stage Partner Offerings page

Click Stage Partner Offerings to run the staging process.

A process request is submitted. Click the Process Monitor link to monitor the status of the request.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Browsing Staged Offerings

This section discusses how to:

- Browse staged partner offerings.
- Browse staged partner offerings by hierarchy.
- Browse staged enterprise catalog offerings.
- Browse staged enterprise catalog offerings by hierarchy.

Note. The field names and information regarding selected catalogs and offerings displayed on the browse pages vary based on the catalog type.

When you browse partner offerings, you only see offerings for an individual partner and partners will only see their own. When you browse enterprise catalog offerings, you see a consolidated view of all partner offerings. Information on these pages is read-only.

Note. All partner users can browse their own partner offerings. However, partners must be granted privileges to browse enterprise catalog offerings.

See Also

Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37

Pages Used to Browse Staged Offerings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Staged Partner Offerings	EOCM_BRWSE_P_STG	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a staged version of a partner catalog. Browse Staged Partner Offerings	Browse staged offerings for the selected partner.
Partner Offering Pricing	EOCM_SOFF_SEC	Click the Offering Prices link on the Browse Staged Partner Offerings page.	View pricing for the selected partner offering.
Partner Offering	EOCM_BRWSDTL_S_SEC	Click the Offering Details link on the Browse Staged Partner Offerings page.	Browse detailed information for the selected partner offering.
Browse Staged Partner Offerings by Hierarchy	EOCM_BROWSEC_TP	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a staged version of a partner catalog. Browse Staged Partner Offerings by Hierarchy	Browse the staged version of the selected partner's offerings by category hierarchy.
Browse Staged Enterprise Catalog by Offering	EOCM_BROWSE_PROD_S	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Staged Enterprise Catalog by Offering	Browse the staged version of the selected enterprise catalog offerings.
Browse Staged Enterprise Catalog by Hierarchy	EOCM_BROWSE_CAT	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Staged Enterprise Catalog by Hierarchy	Browse the staged version of the selected enterprise catalog offerings by category hierarchy.

Browsing Staged Partner Offerings

Access the Browse Staged Partner Offering page (Catalog Management, Catalog Management Home, Browse Staged Partner Offering). The Browse Staged Partner Offering page displays which Category in Catalog is the Item currently associated with.

Categories for This Offering

This grid lists categories assigned to the selected partner offering.

Partner Listings for This Offering

This grid displays information for each partner that offers this product or service.

Offering Prices

Click to access the Partner Offering Pricing page and view pricing information for this offering.

Offering Details

Click to access the Partner Offering Detail page and view details for the selected offering.

Note. The URL field located on the Partner Offering Detail page contains the URL address from the partner source data file. Click Open to link to the URL address in a new browser window. To view attachments in a new browser window go to the Attachments grid and click the View File button associated with the desired attachment

Edit Offering

Click to access the Maintain Partner Data page and manually update offering details.

Browsing Staged Partner Offerings by Hierarchy

Access the Browse Staged Partner Offerings by Hierarchy page (Catalog Management, Catalog Management Home, Browse Staged Partner Offerings by Hierarchy).

Browse Staged Partner Offerings by Hierarchy

Choose an offering category by selecting its folder label in the folder hierarchy. Catalog offerings in that category will appear in Catalog Offerings section below the folder hierarchy. Select the Partner Offerings link to see offering details for that partner.

Catalog ID: MOUNTAIN Mountaineering

Category Hierarchy ID: MOUNTAIN Mountaineering

Find Category

Enter the category name or code to search

*Search By: Category Name

Categories		
Matching Category ID	Matching Category Name	Parent Category ID
SNOW BOOTS	Snow Boots	SNOW GEAR
SNOW GEAR	Snow Gear	MOUNTAIN
SNOW SHOES	Snow Shoes	SNOW SPORTS EQUIP
SNOW SPORTS EQUIP	Snow Sports Equipment	MOUNTAIN

Left | Right

- 📁 [MOUNTAIN - Mountaineering](#)
 - + [CLIMBING EQUIP - Climbing Equipment](#)
 - + [HIKING EQUIP - Hiking Equipment](#)
 - 📁 [SNOW GEAR - Snow Gear](#)
 - 📁 [SNOW SPORTS EQUIP - Snow Sports Equipment](#)
 - + [CROSS COUNTRY EQUIP - Cross Country Ski Equipment](#)
 - 📁 [SNOW SHOES - Snow Shoes](#)
- 📁 [Unknown Category](#)

Catalog Offerings		
Item ID	Item Description	Partner Offerings
1		Partner Offerings

[Go to Catalog Management Home](#)

[Go to Enterprise Console](#)

[Go to Partner Console](#)

Browse Staged Partner Offerings by Hierarchy page

Use the Find Category feature to locate a specific category, or use the folder icons to navigate through the selected hierarchy. Catalog offerings in a selected category appear in the grid below.

Catalog Hierarchy ID

Value reflects the hierarchy selected on the search page. The name of the hierarchy is displayed to the right.

Partner Offerings

Click to access the Browse Staged Partner Offering page and view detail information for the selected offering.

Browsing Staged Enterprise Catalog by Offering

Access the Browse Staged Enterprise Catalog by Offering page (Catalog Management, Catalog Management Home, Browse Staged Enterprise Catalog by Offering).

This page is essentially the same as the Browse Staged Partner Offering page.

See [Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings, page 96.](#)

Browsing Staged Enterprise Catalog Offerings by Hierarchy

Access the Browse Enterprise Catalog Offerings by Hierarchy page (Catalog Management, Catalog Management Home, Browse Enterprise Catalog Offerings by Hierarchy).

This page is essentially the same as the Browse Staged Partner Offerings by Hierarchy page.

See [Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings by Hierarchy, page 96.](#)

Chapter 10

Producing and Syndicating Enterprise Catalogs

This chapter discusses an overview of the catalog versioning process and discusses how to:

- Move catalogs to production.
- Browse production offerings.
- Roll back production catalogs to a previous version.
- Syndicate catalogs.
- Archive and purge catalog data.

Moving Catalogs to Production

This section provides an overview of catalog versioning and discusses how to move catalogs to production status.

Understanding Catalog Versioning

Because Catalog Management maintains multiple versions of catalogs, you can work on a current version without affecting the production version. When a version of the catalog is successfully moved to production, a new catalog version is automatically created by copying the production version and incrementing the catalog version by one. For example, when catalog version two is moved to production, catalog version three is automatically created from version two. When you go to the Catalog Management homepage, version three is listed as the working copy.

Page Used to Move Catalogs to Production

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Move Catalog to Production	EOCM_CATALOG_MTP	Catalog Management, Catalog Management Home Select an enterprise catalog. Move Catalog to Production	Move a catalog to production status.

Moving Catalogs to Production Status

Access the Move Catalog to Production page (Catalog Management, Catalog Management Home, Move Catalog to Production).

Move Catalog to Production

SetID:	SHARE	
Catalog ID:	MOUNTAIN	Mountaineering
Catalog Version:	2	
Description:	<input style="width: 90%;" type="text"/>	

[Go to Catalog Management Home](#)
[Go to Enterprise Console](#)
[Process Monitor](#)

Move Catalog to Production page

Click Run Move to Production Process to move the staged working version of the enterprise catalog to production.

A process request is submitted. Click the Process Monitor link to monitor its status.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Browsing Production Offerings

This section discusses how to:

- Browse production partner offerings.
- Browse production partner offerings by category hierarchy.
- Browse production enterprise catalog offerings.
- Browse production enterprise catalog offerings by category hierarchy.

Note. The field names and information regarding selected catalogs and offerings displayed on the browse pages vary based on the catalog type.

When you browse partner offerings, you only see offerings for an individual partner and partners will only see their own. When you browse enterprise catalog offerings, you see a consolidated view of all partner offerings. Information contained on these pages is read-only.

Note. All partner users can browse their own partner offerings. However, partners need to be granted privileges to browse enterprise catalog offerings and have access to other partners' catalog data.

See Also

[Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37](#)

Pages Used to Browse Production Offerings

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Browse Production Enterprise Catalog by Offering	EOCM_BROWSE_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Production Enterprise Catalog by Offering	Browse the production version of the selected enterprise catalog by offering.
Browse Production Enterprise Catalog by Hierarchy	EOCM_BROWSECAT_MTP	Catalog Management, Catalog Management Home Select an enterprise catalog. Browse Production Enterprise Catalog by Hierarchy	Browse the production version of the selected enterprise catalog by category hierarchy.
Browse Production Partner Offering	EOCM_BRWSE_TP_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Browse Production Partner Offering	Browse the selected partner's offerings within the production version of the selected enterprise catalog.
Browse Production Partner Offerings by Hierarchy	EOCM_BROWSETP_MTP	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Browse Production Partner Offerings by Hierarchy	Browse the selected partner's offerings within the production version of the enterprise catalog by category hierarchy.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Offering Details	EOCM_BRWSEDTL_SEC	<ul style="list-style-type: none"> Click the Offering Details link on the Browse Production Enterprise Catalog by Offering page. Click the Offering Details link on the Browse Production Partner Offering page. 	View offering, pricing, and attachment details for the selected partner offering.

Browsing Production Enterprise Catalog by Offering

Access the Browse Production Enterprise Catalog by Offering page (Catalog Management, Catalog Management Home, Browse Production Enterprise Catalog by Offering).

This page is essentially similar to the Browse Staged Enterprise Catalog by Offering page.

See [Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings, page 96.](#)

Browsing Production Enterprise Catalog Offerings by Hierarchy

Access the Browse Production Enterprise Catalog by Hierarchy page (Catalog Management, Catalog Management Home, Browse Production Enterprise Catalog by Hierarchy).

This page is essentially similar to the Browse Staged Enterprise Catalog by Hierarchy page.

See [Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings by Hierarchy, page 96.](#)

Browsing Production Partner Offerings

Access the Browse Production Partner Offering page (Catalog Management, Catalog Management Home, Browse Production Partner Offering).

This page is essentially similar to the Browse Staged Partner Offerings page.

See [Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings, page 96.](#)

Browsing Production Partner Offerings by Hierarchy

Access the Browse Production Partner Offerings by Hierarchy page (Catalog Management, Catalog Management Home, Browse Production Partner Offerings by Hierarchy).

This page is essentially similar to the Browse Staged Partner Offerings by Hierarchy page.

See [Chapter 9, "Staging and Browsing Partner Offerings," Browsing Staged Partner Offerings by Hierarchy, page 96.](#)

Rolling Back Catalogs to a Previous Version

This section provides an overview of catalog versioning and rollbacks, and discusses how to roll back to a previous catalog version.

Understanding Catalog Versioning and Rollbacks

You roll back a catalog when there is a problem with the production version. Rollback enables you to replace the current production version with a previous version. The system also creates a new working version. For example:

1. Version four is moved to production.
2. You roll back the catalog to replace version four with version three.
3. Version three becomes the latest production version and is named version five.

Note. Versions three and four still exist as they were before the rollback.

4. A new working version, version six, is created.

Page Used to Roll Back Catalogs to a Previous Version

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Rollback Catalog	EOCM_CATALOG_RB	Catalog Management, Catalog Management Home Select an enterprise catalog. Rollback Catalog	Revert to a previous version of a catalog.

Rolling Back to a Previous Catalog Version

Access the Rollback Catalog page (Catalog Management, Catalog Management Home, Rollback Catalog).

Rollback Catalog

SetID: SHARE

Catalog ID: CAMPING Camping

Catalog Version: 2

Rollback Version: 

[Process Rollback](#)

[Go to Catalog Management Home](#) [Go to Enterprise Console](#) [Process Monitor](#)

Rollback Catalog page

Rollback Version Select the catalog version to roll back to.

Process Rollback Click to run the rollback process. A process request is submitted. Click the Process Monitor link to monitor its status.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Syndicating Catalogs

After a catalog has been moved to production, it is ready to be syndicated (distributed) to partners.

Page Used to Syndicate Catalogs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Syndicate Catalog	EOCM_CTLG_SYND	Catalog Management, Catalog Management Home Select an enterprise catalog. Syndicate Catalog	Distribute the catalog to partners.

Syndicating Catalogs

Access the Syndicate Catalog page (Catalog Management, Catalog Management Home, Syndicate Catalog).

Syndicate Catalog

Run Control ID: [Report Manager](#) [Process Monitor](#)

SetID:

Catalog ID:

*Version:

*Syndication Format: *Filename:

*Syndication Locale:

*Category Hierarchy ID:

All Partners

Partners		First	1 of 1	Last
Partner ID	Description			
1	<input type="text" value=""/> <input type="button" value="🔍"/>	<input type="button" value="+"/> <input type="button" value="-"/>		

[Go to Catalog Management Home](#) [Go to Enterprise Console](#)

Syndicate Catalog page

Version	Select a production version of this catalog.
Syndication Format	Select a format for the syndicated file. Select from <i>CSV</i> , <i>Flat</i> , or <i>xCBL file</i> . <hr/> Note. If flat file is selected, the category hierarchy structure is not included. <hr/>
Filename	Enter a description for the syndicated file.
Syndication Locale	Select the distribution location for the file, either <i>Application Server</i> or <i>FTP</i> .
Category Hierarchy ID	Select the category hierarchy to syndicate. The system automatically selects the hierarchy if only a single hierarchy exists for this catalog.
All Partners	Select to syndicate all partners' offerings in this catalog.
Partner ID	Select partners individually by ID. Only offerings of the selected partners are syndicated.
Run	Click to run the syndication process. The process is submitted. Click the Process Monitor link to monitor the status of the process.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Archiving and Purging Catalog Data

This section provides an overview of the archive process and discusses how to:

- Use the archive/purge catalog data feature.
- Archive enterprise catalog data.
- Purge archived data.
- Restore archived data.

Understanding the Archive Process

Archiving enterprise catalog data allows catalog managers to manage the volumes of data maintained by Catalog Management by moving enterprise catalog data, that is no longer required, to history files. Removing this historical data from online tables prevents the database from increasing to an unmanageable size, and improves overall performance. The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

Page Used to Archive and Purge Catalog Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Archive/Purge Catalog Data	EOCM_CTLG_ARCH	Catalog Management, Catalog Management Home. Select an enterprise catalog. Archive/Purge Catalog Data.	Archive enterprise catalog data by catalog version. Purge archived data from the system. Restore archived data to online files.

Using the Archive and Purge Catalog Data Feature

Access the Archive/Purge Catalog Data page (Catalog Management, Catalog Management Home, Archive/Purge Catalog Data).

Archive/Purge Catalog Data

SetID: SHARE
Catalog ID: MOUNTAIN Mountaineering
Archive ID: MNT01
***Description:**
***Archive Action:** ▾
Archive State: Not Archived

[Customize](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

	*Catalog Version	Description	
1	<input type="text" value="1"/> 🔍		+ -

Last Update Date/Time: 08/21/2009 2:45:10PM **Last Update User ID:** ENTMGR_PRO

[Go to Catalog Management Home](#) [Go to Enterprise Console](#) [Process Monitor](#)

Archive/Purge Catalog Data page

- SetID and Catalog ID** Values are based on the enterprise catalog selected on the Catalog Management Home page.
- Archive ID** Displays the value entered on the Search page.
- Archive Action** Archive action can be one of these options:
Archive the Data: Copies the data from the online tables into the history table, and then removes the data from the online tables. This is the only option available for data that has not been archived.
Purge from Archive: Deletes previously archived data from the history table. Once purged, the data cannot be restored.
Restore from Archive: Moves previously archived data from the history table back to the online tables.
- Archive State** Displays the current state of the selected catalog data. States include: *Not Archived*, *Archived*, *Purged*, and *Restored*.
- Select Catalog Version** Select the catalog versions that you want to archive, purge, or restore. The versions available will be based on the selected action.

Run Archive Process

Select to run the application engine EOCM_ARCH archive process. The process is submitted. Click the Process Monitor link to monitor the status requests.

Note. The archive state will change accordingly when the process has successfully completed.

Archiving Enterprise Catalog Data

The archive feature copies the enterprise catalog data from the online tables into the history table, and then removes the data from the online tables. This is the only option available for data that has not been archived.

To archive enterprise catalog data:

1. Go the Archive/Purge Catalog Data page.

Select the desired archived enterprise catalog version. The displayed archive state is: *Not Archived*.

2. Select the archive action *Archive the Data*.
3. Click Run Archive Process.

The application engine EOCM_ARCH process is submitted.

4. Click the Process Monitor link to monitor the status requests.

Note. The archive state will change to *Archived* when the process has successfully completed. The catalog version will no longer be available for selection from Catalog Management.

Purging Archived Data

The purge feature deletes previously archived data from the system. Once purged, the data cannot be restored.

To purge archived data:

1. Go the Archive/Purge Catalog Data page.

Select the desired archived enterprise catalog version. The displayed archive state is: *Archived*.

2. Select the archive action *Purge from Archive*.
3. Click Run Archive Process.

The application engine EOCM_ARCH process is submitted.

4. Click the Process Monitor link to monitor the status of requests.

Note. The archive state will change to *Purged* when the process has successfully completed, and the archive action field will be inactive.

Restoring Archived Data

The restore feature moves previously archived data from the history table back to the online tables.

To restore archived data:

1. Go the Archive/Purge Catalog Data page.

Select the desired archived enterprise catalog version. The displayed archive state is: *Archived*.

2. Select the archive action *Restore from Archive*.

3. Click Run Archive Process.

The application engine EOCM_ARCH process is submitted.

4. Click the Process Monitor link to monitor the status of requests.

Note. The archive state will change to *Restored* when the process has successfully completed. The catalog version will be available for selection from Catalog Management.

Chapter 11

Maintaining Enterprise Catalog and Partner Offerings

This chapter provides an overview of the process to maintain catalog and partner offerings and discusses how to:

- Add or change enterprise catalog data.
- Add or change partner offering data.

Note. Partners can only be granted privileges to access the Maintain Partner Data page.

See Also

[Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Enterprise Managers and Granting Privileges, page 36](#)

[Chapter 5, "Creating Enterprise Catalog Definitions," Assigning Partners and Granting Privileges, page 37](#)

Adding or Changing Enterprise Catalog Data

You use the Maintain Enterprise Catalog Data page to manually enter and change data about the enterprise catalog.

Pages Used to Add or Change Enterprise Catalog Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Maintain Enterprise Catalog Data	EOCM_ADD_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog Maintain Enterprise Catalog Data	Manually enter and change data about the enterprise catalog and its associated partners' offerings.
Partner Offering Detail	EOCM_SOFFDTL_SEC	Click the Offering Details link on the Maintain Enterprise Catalog Data page.	Review associated partner offering information.

Maintaining Enterprise Catalog Data

Access the Maintain Enterprise Catalog Data page (Catalog Management, Catalog Management Home, Maintain Enterprise Catalog Data).

Maintain Enterprise Catalog Data

Catalog ID: MOUNTAIN Mountaineering **Catalog Version:** 2

Item ID: CMP-DG

***Item Description:**

Long Description:

Categories for this Offering. Customize | Find | View All | First 1 of 1 Last

Category ID	Category Name	Primary Category		
1	COMPASSES	Compasses	<input checked="" type="checkbox"/>	+ -

Partner listings for this Offering. Customize | Find | View All | First 1-2 of 2 Last

Partner ID	Name	Vendor Item Description	Vendor Item ID	Offering Details
1001	Camper's Warehouse	Digital Compass	CMP-DG	Offering Details
1002	Trailblazers	Digital Compass	CMP-DG	Offering Details

[Go to Catalog Management Home](#) [Go to Enterprise Console](#)

Maintain Enterprise Catalog Data page

You use this page to:

- Add new catalog offerings.
- Modify catalog offering descriptions.
- Add, remove, or change categories.
- Review associated partner offerings.

Note. New catalog offerings are added to the current working version of the enterprise catalog. Any catalog offerings that have been manually added can only be updated when they are either staged or in production.

Category ID Change the existing category or add a new category.

Primary Category Select to indicate the offering's primary category. This is the category used for Supply Chain Management.

Offering Details Click to access the Partner Offering Detail page and view more information about an offering.

Adding or Changing Partner Offering Data

You use the Maintain Partner Offering Data page to manually enter and change data about partner offerings.

Page Used to Add or Change Partner Offering Data

Page Name	Definition Name	Navigation	Usage
Maintain Partner Data	EOCM_ADD_TP_PROD	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Maintain Partner Data	Manually enter and change data about partner offerings.

Maintaining Partner Data

Access the Maintain Partner Data page (Catalog Management, Catalog Management Home, Maintain Partner Data).

Maintain Partner Data

Catalog ID:	MOUNTAIN	Mountaineering	Catalog Version:	2
Partner ID:	1001	Camper's Warehouse	Load Version:	1
Item ID:	PK-LTL	Adult Lightweight Top Loading Pack		
Vendor Item ID:	PK-LTL			

Offering Details Find | View All | First 1 of 1 Last

Effective Date:	10/24/2002	Status:	Active	+ -
*Vendor Item Description:	Adult Lightweight Top Loading Pack			
Category Description:	BACKPACKS			
Category Code:	BACKPACKS			
URL	<input style="width: 100%;" type="text"/>			
Manufacturer ID:	<input style="width: 100%;" type="text"/>			
Manufacturer Part Number:	<input style="width: 100%;" type="text"/>			
Conversion Rate:	1.00000000			

Maintain Partner Data page

Use this page to:

- Add new partner offerings.
- Modify current partner offering detail information.
- Change effective date information for an existing partner offering.

To prevent errors, you should be familiar with the format and the field type for each value you need to update before adding or changing partner offering detail information.

Note. These functions can be performed in any existing version of a partner catalog. The selected version can be in created, loaded, categorized, staged, or production.

A warning message appears when you attempt to save changes to partner offerings that are part of a production enterprise catalog.

Offering Details

The fields here correspond with the catalog map definition for the selected partner source. Modify any field or add more units of measure with associated prices and currency codes. You can also add a new effective-dated record.

Chapter 12

Comparing Versions of Partner Catalogs

This chapter discusses how to:

- Generate comparison reports.
- View comparison reports.

Note. This feature is only available for catalog versions where the partner's offering data has already been transformed into the enterprise catalog format and loaded into the enterprise catalog.

Generating Comparison Reports

You can compare two versions of a partner catalog.

Page Used to Generate Comparison Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Compare Partner Versions	EOCM_COMPARE_VER	Catalog Management, Catalog Management Home Select an enterprise catalog. Select the newer of the partner catalogs that you want to compare. Compare Versions	Compare two partner catalog versions.

Generating Comparison Reports for Partner Catalogs

Access the Compare Versions page (Catalog Management, Catalog Management Home, Compare Versions).

Compare partner version *n* to partner version Select the second partner versions to compare.

Note. Only partner versions that are earlier than the version selected on the Enterprise Catalog Console page are available.

Field Name Select the check boxes associated with attributes that you want to compare. The list of attributes is based on catalog type.

The report includes only those offerings that have differences between the selected versions, considering only the attributes selected.

Note. Avoid selecting all fields for a single report, as this can create many rows and increase report generation time.

Generate Report Click to generate the comparison report. The Process Scheduler Request page is displayed.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Viewing Comparison Reports

You can filter comparison results to analyze the data most effectively.

Page Used to View Comparison Reports

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Report	EOCM_VIEW_VERSIONC	Catalog Management, Catalog Management Home Select an enterprise catalog. Select the newer of the partner catalogs that you want to compare. Compare Versions, View Report	View comparison data between two partner catalog versions.

Viewing Comparison Data

Access the View Report page (Catalog Management, Catalog Management Home, Compare Versions, View Report).

If you do not need this data again, click Delete Report to remove the report from the system.

Numeric Filter

You can filter comparison results by a selected numeric field based on an amount or percent difference. For example, results can be displayed in the filtered rows view if the vendor price of an offering shows a difference greater than 10.00.

Numeric Field Select a numeric field. Only numeric fields selected for comparison are available.

Amount Difference and Percent Difference To apply a filter:

1. Select to filter by amount or percent.
2. Select an operator. Choose from:
 - Less than.
 - Less than or equal to.
 - Equal to.
 - Greater than.
 - Greater than or equal to.
3. Enter the amount or percent difference to filter by.

Filter Rows Click to view results based on the filter criteria entered.

All Rows Click to remove any previous filtering and view results without filtering.

Results

For each offering in the partner catalog that contains differences, the Results grid displays the fields selected for comparison.

Max Rows Enter the maximum number of rows, no greater than 300, to display in the Results grid.

Vendor Item ID Click the ID to access the Maintain Partner Data page for that offering and update the data.

Note. The Maintain Partner Data information updates the newer version of the catalog. Any updates made are not seen on the comparison report until it has been regenerated.

View Values Tab

Select the View Values tab.

Version <Newer Catalog Version Number> Value

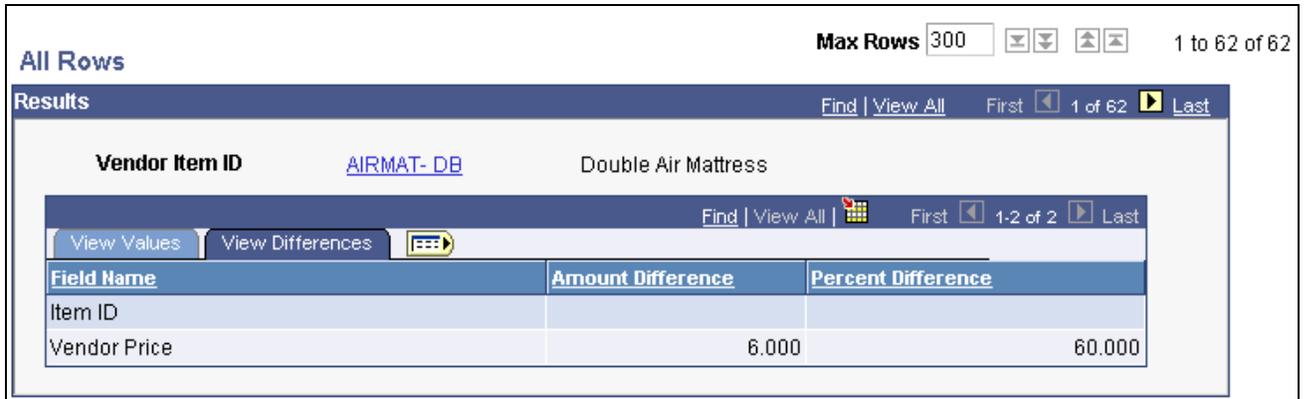
Displays the value found in the newer catalog version for the associated field.

Version <Older Catalog Version Number> Value

Displays the value found in a previous catalog version for the associated field.

View Differences Tab

Select the View Differences tab.



View Report page: View Differences tab

Amount Difference

Displays the amount difference from the older version to the newer version, for numeric fields only.

Percent Difference

Displays the percent difference from the previous version to the newer version, for numeric fields only.

See Also

Chapter 11, "Maintaining Enterprise Catalog and Partner Offerings," Maintaining Partner Data, page 113

Appendix A

Using Component Interfaces

This appendix discusses how to use component interfaces to access Catalog Management components.

Using Component Interfaces to Access Components

A component interface is a PeopleTools object created in Application Designer. It allows you to access a PeopleSoft component from another application, a PeopleSoft application engine program, or another external application. The application can simultaneously update a component's underlying data and use its business logic without knowing the details of page structures or component definitions.

The Maintain Catalog Partners and Maintain Categories components, delivered with Catalog Management, use component interfaces to update partner registration and category information, respectively.

Suppose you want to create 500 new categories. You can use PeopleCode to call the EOCM_CATEGORY_CI component interface to load the data more efficiently into the EOCM_CATEGORY table using an excel spreadsheet or another application.

PeopleSoft provides component interfaces for the following areas in Catalog Management:

<i>Component Interface</i>	<i>Description</i>
EOTP_QUICKPARTNER_CI	Maintain Partner Registration
EOCM_CATEGORY_CI	Maintain Categories

See Also

PeopleTools PeopleBook: PeopleSoft Component Interfaces

Appendix B

Setting Security Options For Workflow

This appendix discusses how to:

- Set user profile attributes.
- Set permissions.
- Define role options.
- Update Simple Mail Transfer Protocol (SMTP) settings.

Setting User Profile Attributes

Workflow settings and a valid primary email address must be specified for all Catalog Management users who need to receive notifications.

To specify workflow settings and a primary email address:

1. Select PeopleTools, Security, User Profiles, User Profiles, Workflow.
2. Select Routing Preferences for Worklist User and Email User.
3. Select the General tab.
4. Click the Edit Email Address link.
5. Select the email type, and select the Primary Email Account check box.

Workflow notification emails will be sent to this email address.

See Also

PeopleTools PeopleBook: Security Administration.

Setting Permissions

PeopleSoft delivers the EOCM1500 (partner users), and EOCM6500 (enterprise catalog managers) permission lists. These permission lists enable users to perform specific catalog management activities. Permissions are preconfigured as:

- Component interfaces.
- PeopleSoft Query access groups and profiles.

To set the permissions for these permission lists:

1. Select PeopleTools, Security, Permissions & Roles, Permission Lists.
2. Select a permission list.
3. Access the Component Interfaces page.
4. Select *EOCM_CATEGORIZE_CI* and assign full access to all methods.
5. Access the Query page.
6. Make sure that the access group permissions are set to with these options:

The tree name is *QUERY_TREE_EOCM*.

The access group is *EOCM_ACCESS_GROUP*.

The Accessible check box is selected.

7. For the query profile, make sure that the Only allowed to run queries check box is selected.

Note. If you create permission lists for partner users and enterprise catalog managers, you must also perform these steps for those lists.

See Also

PeopleTools PeopleBook: Security Administration.

Defining Role Options

PeopleSoft delivers predefined workflow roles, including Catalog Partner and Enterprise Catalog Manager, which are assigned to partner and enterprise catalog manager users.

To define role options for workflow:

1. Select PeopleTools, Security, Permissions & Roles, Roles, Workflow.
2. Select the Use Query to Route Workflow check box.
3. Select *EOCM_ROLE_QUERY* for the query name.

Creating a New Enterprise Catalog Manager Role

To associate the Enterprise Catalog Manager role with the workflow step object:

1. Select Application Designer, Activity.

2. Open *EOCM_APPROVE_CAT_OFF*.
3. Right-click and select Approve Offerings WL, Item Properties.
4. In the Worklist Definition window, click the Field Mapping button.
5. In the Field Map window, double-click OPRID to open the Map Field window.
6. Select the role name created for the enterprise catalog manager.
7. Click Specify Bind Variables to open the Specify Query Bin Variables window.

Verify the *setID* and *EOCM_CATALOG_ID* are listed as bind variables.

Note. If they are not listed, define the role options for workflow.

See Also

PeopleTools PeopleBook: Security Administration.

Updating SMTP Settings

SMTP settings must be modified to enable email notifications. This task must be performed for the application server and the Process Scheduler server.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

Appendix C

Setting Automatic Daily Partner Cleanup

This appendix provides an overview of daily partner cleanup and discusses how to initiate automatic daily partner cleanup.

Understanding Daily Partner Cleanup

All partners must be registered and have the required services and users assigned before they can be associated with a catalog in Catalog Management. If a registered partner terminates the partnership, these cleanup operations are performed automatically:

- Assigned services are deleted.
- Assigned users are deleted.
- User profiles are deleted.
- Partner status is changed to *Ended Partnership*.

The Application Engine batch process (EOCM_TRDP_AE) runs at a scheduled time to monitor changes in partner status. If a partner's registration has been terminated, this process sets Catalog Management partner status to *Inactive* and deletes partner users from their associated catalogs.

PeopleSoft delivers a Process Scheduler recurrence schedule, EOCM Daily Partner Cleanup, as an example.

Initiating Automatic Daily Partner Cleanup

This section discusses how to:

- Set the recurrence schedule.
- Set process definition options.
- Initiate the Application Engine process request.

Once the request is initiated, the process runs automatically at the scheduled time without any user intervention.

Setting the Recurrence Schedule

To set the recurrence schedule:

1. Select PeopleTools, Process Scheduler, Recurrences.
2. Open the recurrence titled EOCM Daily Partner Cleanup.
3. Provide parameters for the Recurrence Pattern, Start Request, End Request, and Repeat regions.
4. In the Schedule Next Recurrence when section, select Current Request is Initiated.

Setting Process Definition Options

To define process definition options for the EOCM_TRDP_AE process:

1. Select PeopleTools, Process Scheduler, Processes.
2. Select the EOCM_TRDP_AE process.
3. Access the Process Definition Options page.
4. Enter the following information:

Server Name	Enter a valid Process Scheduler server name.
Recurrence Name	Select <i>EOCM Daily Partner Cleanup</i> .
Component	Select <i>AE_REQUEST</i> .
Process Groups	Select <i>EOCMALL</i> .

Initiating the Application Engine Process Request

To initiate automatic daily partner cleanup:

1. Select PeopleTools, Application Engine, RequestAE.
2. When adding the new run control, select *EOCM_TRDP_AE* for the program name.
3. On the Application Engine Request page, select *Always* in the Process Frequency field.

This selection automatically runs the process on the defined recurrence schedule.

4. Click Run to initiate the request.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler.

PeopleTools PeopleBook: PeopleSoft Application Engine.

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