

PeopleSoft®

PeopleSoft Catalog Management for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook

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PeopleSoft Catalog Management for Financials, Enterprise Service Automation and Supply Chain Management
8.8 PeopleBook
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About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, <http://www.peoplesoft.com/corp/en/login.asp>

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number <i>0</i> , not the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W , hold down the ALT key while you press W .
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>
(ISO)	<p>Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses.</p> <p>The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example:</p> <p>(GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.</p>
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word <i>See</i> . Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and Don't Run	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Catalog Management Preface

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

PeopleSoft Catalog Management

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.

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 PeopleSoft Catalog Management 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 20](#)

[Chapter 6, “Importing Partner Source Files,” page 33](#)

[Chapter 7, “Mapping, Transforming, and Loading Partner Source Data,” page 39](#)

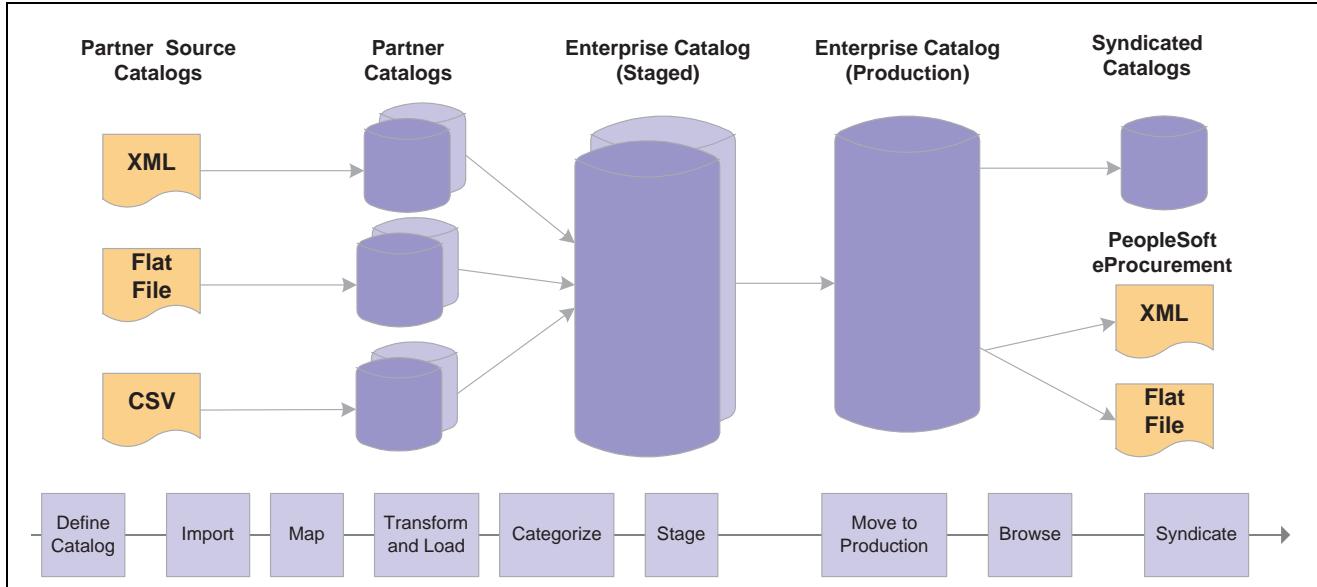
[Chapter 8, “Categorizing Offering Data,” page 49](#)

[Chapter 9, “Staging and Browsing Partner Offerings,” page 67](#)

[Chapter 10, “Producing and Syndicating Enterprise Catalogs,” page 73](#)

PeopleSoft Catalog Management Business Processes

The following diagram illustrates the catalog management process flow:

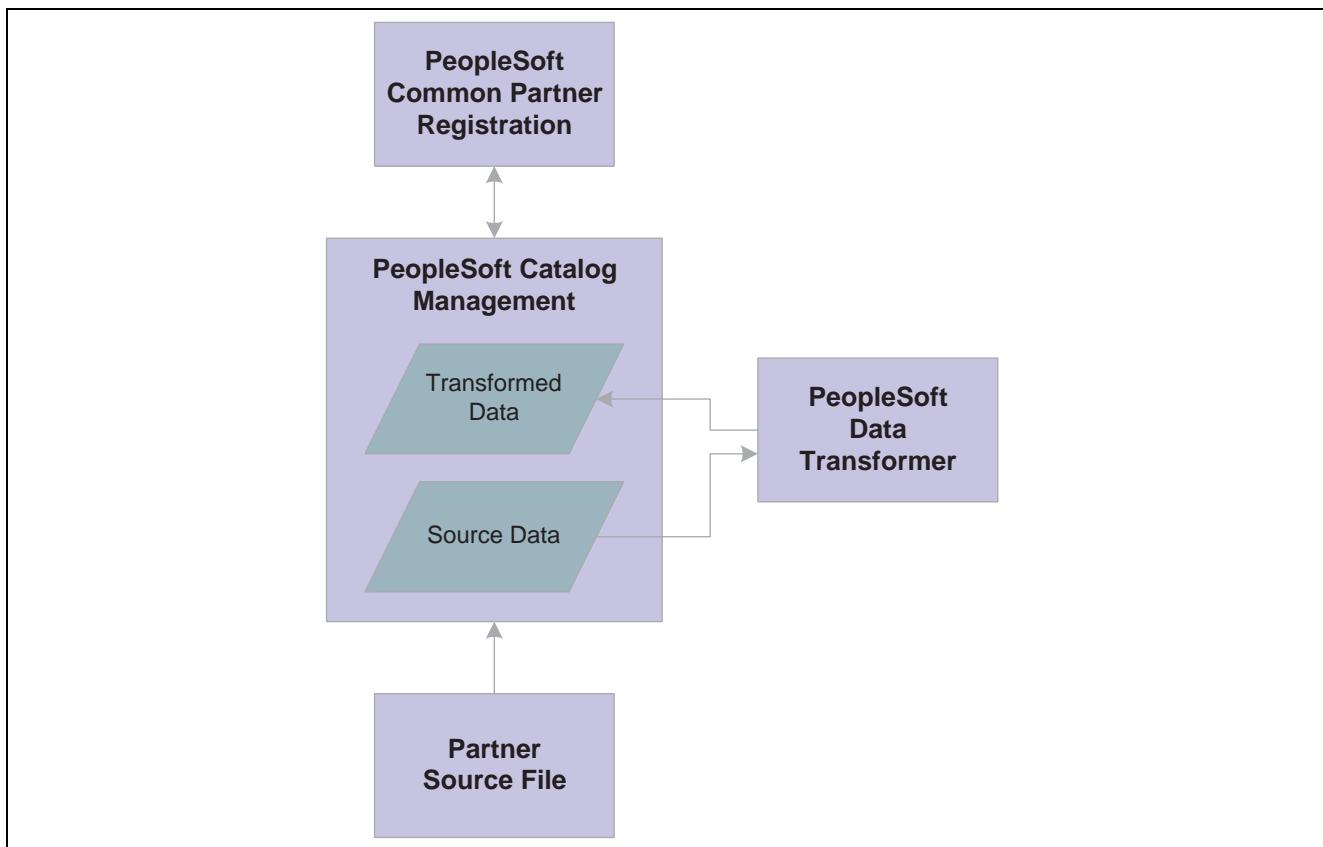


PeopleSoft Catalog Management business process flow

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

PeopleSoft Catalog Management Integrations

PeopleSoft Catalog Management integrates with the following PeopleSoft products:



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:

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

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

Defining Installation Options

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

Step	Reference
1. Define PeopleSoft Catalog Management installation options.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Defining Installation Options, page 13
2. Define fields for categorization rules.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Selecting Fields for Categorization Rules, page 15
3. Define default workflow notifications.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Defining Default Workflow Notifications, page 15

Creating Categories and Category Hierarchies

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

Step	Reference
1. Create categories.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Creating Categories, page 17
2. Create category hierarchies.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Creating Category Hierarchies, page 17
3. Load UNSPSC.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Loading UNSPSC, page 19

Creating Enterprise Catalog Definitions

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

Step	Reference
1. Define general catalog information.	Chapter 5, “Creating Enterprise Catalog Definitions,” Defining General Catalog Information, page 27
2. Assign enterprise managers and grant privileges.	Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Enterprise Managers and Granting Privileges, page 28
3. Assign partners and grant privileges.	Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Partners and Granting Privileges, page 30
4. Associate category hierarchies.	Chapter 5, “Creating Enterprise Catalog Definitions,” Associating Category Hierarchies, page 31
5. Specify workflow options.	Chapter 5, “Creating Enterprise Catalog Definitions,” Specifying Workflow Options, page 31

Registering Partners

The catalog administrator can register partners within PeopleSoft Catalog Management. The system automatically approves the registration and updates PeopleSoft Common Partner Registration.

Step	Reference
1. Create Provide Catalog Information and View Catalog Information services within PeopleSoft Common Partner Registration. In order to register partners in PeopleSoft Catalog Management the provide and view catalog information services must be created within PeopleSoft Common Partner Registration.	<i>PeopleSoft Common Partner Registration for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook</i> , “Getting Started with PeopleSoft Common Partner Registration”
2. Register partners.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Registering Catalog Partners, page 20
3. Associate users with registered partners.	Chapter 4, “Setting Up PeopleSoft Catalog Management,” Adding New Partner Information, page 21

CHAPTER 2

Understanding PeopleSoft Catalog Management

This chapter discusses:

- Partner processes.
- Category hierarchies.
- Transformations.
- Categorization.
- Versioning.
- Security.
- Roles.

Partner Processes

PeopleSoft Catalog Management enables your 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 30](#)

Category Hierarchies

With PeopleSoft Catalog Management, you can either create your own categories and category hierarchies, or you can use the United Nations Standard Products and Services Classification code (UNSPSC). 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.
- Manage multiple hierarchies within a single catalog.

See Also

[Chapter 4, “Setting Up PeopleSoft Catalog Management,” Creating Categories and Category Hierarchies, page 16](#)

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, PeopleSoft 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 45](#)

Categorization

Organizing offerings into a category hierarchy enables users to quickly search and locate appropriate products and services. With PeopleSoft 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 49](#)

Versioning

PeopleSoft 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.

Security

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

Roles

There are four significant roles in PeopleSoft 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 set-up 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 PeopleSoft Catalog Management navigation.

Understanding PeopleSoft Catalog Management Navigation

PeopleSoft 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).
- 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.
- Manually enter or change catalog data.
- Select a partner catalog to work with.

From the Partner Catalog Console page, you can:

- Map partner catalog structure to your 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.

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

Pages Used to Navigate PeopleSoft Catalog Management

Page Name	Object Name	Navigation	Usage
Catalog Management Home	EOCM_MAIN_PAGE	Catalog Management, Catalog Management Home Select an enterprise catalog.	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.
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 discusses how to:

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

Defining Installation Options

This section discusses how to:

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

Pages Used to Define Installation Options

Page Name	Object 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 Installation Options

***TableSpace for Catalog Sources:** EOCMWRK

***URL for Attachments:** EOCM_URL

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

Customer Catalog **Procurement Catalog** **Training Catalog**

Last Table Number: 222 **Last Map Number:** 204

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_xxxxxxxxx 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 PeopleSoft Catalog Management.

See Also

[Chapter 5, “Creating Enterprise Catalog Definitions,” Defining General Catalog Information, page 27](#)

Selecting Fields for Categorization Rules

Access the Procurement Categorization, Customer Categorization or Training Categorization page.

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

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 the following stages:

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

Note. Because completing the approval process requires action from the enterprise catalog manager, a worklist notification is also triggered for that process.

Pages Used to Define Default Workflow Notifications

Page Name	Object Name	Navigation	Usage
Define Notification Defaults	EOCM_DEFALT_NOTIFY	Catalog Management, Catalog Management Home Page, Define Notification Default	Specify the process stages when users should be notified.

Defining Default Notifications

Access the Define Notification Defaults page.

Define Notification Defaults

Notification		Notification Method		
1	2 Categorized	E-mail only	[+]	[-]
2	3 Offering, Categories Approval	E-mail and Worklist	[+]	[-]
3	5 Move to Production	E-mail only	[+]	[-]
4	6 Rolledback	E-mail only	[+]	[-]
5	7 Syndicated	E-mail only	[+]	[-]

[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 A, “Setting Security Options For Workflow,” page 91](#)

[Chapter 5, “Creating Enterprise Catalog Definitions,” Specifying Workflow Options, page 31](#)

Creating Categories and Category Hierarchies

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

- Create categories.
- Create category hierarchies.
- Download the United Nations Standard Products and Services Classification Code (UNSPSC).

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

The UNSPSC system is an open, global electronic commerce standard that provides a logical framework for classifying products and services. The UNSPSC is a hierachal 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

Page Name	Object Name	Navigation	Usage
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 UNSPSC	EOCM_LOAD_UNSPSC	Catalog Management, Categories, Load UNSPSC	Load the UNSPSC classification scheme into a category hierarchy.

Creating Categories

Access the Maintain Categories page.

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

Comments Enter a more detailed description.

(Optional) Category Code 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.

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	<input type="button" value="Refresh"/>						
*Category Hierarchy Name: <input type="text" value="Sports Apparel"/>							
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Add Category <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; vertical-align: top;"> Category ID: <input type="text"/> </td> <td style="width: 15%; text-align: right; vertical-align: top;"> <input type="button" value="Search"/> </td> </tr> <tr> <td colspan="2"> Category Name: <input type="button" value="Add"/> </td> </tr> <tr> <td colspan="2" style="text-align: center;"> Create new Category </td> </tr> </table> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="button" value="Copy the Selected Category"/> <input type="button" value="Remove Category from Hierarchy"/> </div> <div style="width: 45%;"> <p>To move the selected category, copy that category to the new folder, then remove the category from the prior folder.</p> </div> </div>		Category ID: <input type="text"/>	<input type="button" value="Search"/>	Category Name: <input type="button" value="Add"/>		Create new Category	
Category ID: <input type="text"/>	<input type="button" value="Search"/>						
Category Name: <input type="button" value="Add"/>							
Create new Category							
Left Right							
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> [+] APPAREL - Sports Apparel <ul style="list-style-type: none"> [+] LOGO MERCHANDISE - Logo Merchandise <ul style="list-style-type: none"> [+] LOGO ACCESSORIES - Logo Accessories [+] LOGO WEAR - Logo Wear [+] SNOW GEAR - Snow Gear </div>							
Go to Catalog Management Home							

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.

Loading UNSPSC

Access the Load UNSPSC page.

Load UNSPSC

Run Control ID:	UNSPSC
*Category Hierarchy ID:	<input type="text"/>
*Category Hierarchy Name:	<input type="text"/>
<input type="checkbox"/> Overwrite	
<input type="button" value="Load UNSPSC"/>	
Go to Catalog Management Home Process Monitor	

Load UNSPSC page

You need to download the file from the UNSPSC homepage and save it as a text (tab-delimited) file.

Overwrite

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

Load UNSPSC

Click to locate and select the UNSPSC file on your computer. When selected, the navigation path appears.

Click the Upload button to process the request.

When the process has completed successfully, the UNSPSC categories and hierarchy are available in PeopleSoft Catalog Management.

See Also

<http://www.unspsc.net>

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler.

Registering Catalog Partners

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 PeopleSoft Common Partner Registration.

The basic steps to complete partner registration are:

1. Create required PeopleSoft Catalog Management services.

Services are created automatically within PeopleSoft Common Partner Registration if they do not exist for the process and Set ID combinations selected when a partner is created through PeopleSoft 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 PeopleSoft Catalog Management. The system automatically updates Common Partner Registration. 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 PeopleSoft Catalog Management must be registered using the PeopleSoft Common Partner Registration system.

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

See Also

PeopleSoft Common Partner Registration for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook

[Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Partners and Granting Privileges, page 30](#)

[Appendix B, “Setting Automatic Daily Partner Cleanup,” page 95](#)

Pages Used to Maintain Catalog Partners

Page Name	Object Name	Navigation	Usage
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.
Maintain Catalog Partners - Edit Address	EO_ADDR_DFT_SEC	Click the Edit Address link on the Addresses page.	Edit the partner's company address or alternate address information.

Adding New Partner Information

Access the Maintain Catalog Partners - Information page.

Information		Addresses				
Partner ID:	1230		Company Name:	Enchantment Cosmetics		
Primary Contact						
*First Name:	Erica		*Last Name:	Kane		
*E-mail Address:	erica_kane@enchantment.com					
Phone Number:	320-555-1234	Ext:	100	Fax:	320-555-1231	
SETIDs for Catalog Partner			Find	View All	First 1-2 of 2 Last	
	SetID	Description	Provide Catalog Information	View Catalog Information		
1	SHARE	Shared SetID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
2	US001	US001 Business Unit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
Partner Users			Find	View All	First 1 of 1 Last	
User ID:	EKane		Partner Administrator	<input checked="" type="checkbox"/>	+	-
Description:	Erica Kane - Administrator					
SETIDs for Catalog User			Find	View All	First 1-2 of 2 Last	
	SetID	Description	Provide Catalog Information	View Catalog Information		
1	SHARE	Shared SetID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
2	US001	US001 Business Unit	<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

[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 PeopleSoft 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 PeopleSoft 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 8.44 PeopleBook: PeopleTools Security.

Adding Partner Address Information

Access the Maintain Catalog Partners - Addresses page.

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

This section 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 49](#)

[Chapter 7, “Mapping, Transforming, and Loading Partner Source Data,” Defining Catalog Maps, page 39](#)

[Chapter 7, “Mapping, Transforming, and Loading Partner Source Data,”
Transforming and Loading Data, page 45](#)

[Chapter 9, “Staging and Browsing Partner Offerings,” Staging Partner Offerings, page 67](#)

Pages Used to Define New Enterprise Catalogs

Page Name	Object Name	Navigation	Usage
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.
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 PeopleSoft Catalog Management process stages to notify enterprise managers and partners.

Defining General Catalog Information

Access the Maintain Catalogs - General page.

General	Enterprise Managers	Partners	Categories	Workflow Options
SetID: SHARE	Catalog ID: APPAREL			
*Catalog Name: <input type="text" value="Outdoor Apparel"/>				
*Catalog Type: <input type="button" value="Customer Catalog"/>				
Comments: Clothing and accessories for outdoor activities				
Created on:	10/24/2002	Created By:	CATADMIN	
Catalog Version: 2				
Go to Catalog Management Home				

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 13](#)

Assigning Enterprise Managers and Granting Privileges

Access the Maintain Catalogs - Enterprise Managers page.

SetID: SHARE Catalog ID: APPAREL Outdoor Apparel

Enterprise Users

*User ID	All	Define Map	Load Data	Categorize	Stage	Syndicate	Production/Rollback	Manual Update	Approve	Notify
1 ENTMGR_CUS	<input checked="" type="checkbox"/>									

Go to Catalog Management Home

Maintain Catalogs - Enterprise Managers page

User ID

Select the enterprise managers assigned to this catalog.

All

Select to grant privileges for all activities. Clear 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 via PeopleTools Security or they will not have access, despite the selections made here.

See Also

[Chapter 2, “Understanding PeopleSoft Catalog Management,” Roles, page 9](#)

[Chapter 10, “Producing and Syndicating Enterprise Catalogs,” Syndicating Catalogs, page 79](#)

[Chapter 10, “Producing and Syndicating Enterprise Catalogs,” Moving Catalogs to Production, page 73](#)

[Chapter 11, “Maintaining Enterprise Catalog and Partner Offerings,” page 81](#)

[Chapter 8, “Categorizing Offering Data,” Approving Categorization Results, page 64](#)

Assigning Partners and Granting Privileges

Access the Maintain Catalogs - Partners page.

General Enterprise Managers **Partners** Categories Workflow Options

SetID: SHARE Catalog ID: APPAREL Outdoor Apparel

Partners Find | View All First 2 of 3 Last

*Partner ID: 1003 Everest Gear 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	DPOND	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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 PeopleSoft Catalog Management service processes.

Status Displays the current status of the selected partner, *Active* or *Inactive*.

Partners become active when they have registered and have been approved for at least one PeopleSoft Catalog Management service process. Their status becomes inactive if they terminate their registration via PeopleSoft Common Partner Registration.

User ID Select partner users.

Note. You can only select users that are associated with the selected partner in the Common Registration component.

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:

- 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 20](#)

[Chapter 11, “Maintaining Enterprise Catalog and Partner Offerings,” Maintaining Partner Data, page 83](#)

[Chapter 9, “Staging and Browsing Partner Offerings,” Browsing Staged Offerings, page 68](#)

[Chapter 10, “Producing and Syndicating Enterprise Catalogs,” Browsing Production Offerings, page 74](#)

Associating Category Hierarchies

Access the Maintain Catalogs - Categories page.



The screenshot shows a web-based application interface for managing catalog categories. At the top, there is a navigation bar with tabs: General, Enterprise Managers, Partners, Categories (which is highlighted in blue), and Workflow Options. Below the tabs, the SetID is listed as SHARE and the Catalog ID is APPAREL. To the right of the Catalog ID, the text "Outdoor Apparel" is displayed. The main content area is titled "Category Hierarchies". It includes a toolbar with links for Customize, Find, View All, and navigation buttons for First, Last, and Page 1 of 1. A table lists category hierarchies, with the first row showing Category Hierarchy ID 1 and Category Hierarchy Name APPAREL, with a "Sports Apparel" entry under it. There are "View" and "Edit" buttons for this row, along with "+" and "-" buttons for managing the hierarchy. At the bottom of the page, there is a link to "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 16](#)

Specifying Workflow Options

Access the Maintain Catalogs - Workflow Options page.

General	Enterprise Managers	Partners	Categories	Workflow Options
SetID: SHARE	Catalog ID: APPAREL	Outdoor Apparel		
Catalog Notifications Customize Find First 1-7 of 7 Last				
*Notification	Notification Method			
1 Loaded	E-mail only			
2 Categorized	E-mail only			
3 Offering,Categories Approval	E-mail and Worklist			
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 15](#)

CHAPTER 6

Importing Partner Source Files

This chapter discusses how to:

- Define catalog source layout.
- Import source data.

Defining Catalog Source Layout

This section discusses how to:

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

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

Note. 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.

Pages Used to Define Catalog Source Layout

Page Name	Object Name	Navigation	Usage
Maintain Catalog Sources - Source Definition	EOCM_DATA_SRC_1	Catalog Management, Catalog Management Home Page, Maintain Catalog Sources, Source Definition Catalog Management, Catalogs, Maintain Catalog Sources, Source Definition	Specify the file format to use to import the partner source catalog data.
Maintain Catalog Source - Source Fields	EOCM_DATA_SRC_2	Catalog Management, Catalog Management Home Page, Maintain Catalog Sources, Source Definition, Source Fields Catalog Management, Catalogs, Maintain Catalog Sources, Source Definition, Source Fields	Specify the fields contained in the source file.

Defining the File Format

Access the Maintain Catalog Sources - Source Definition page.

Source Definition | **Source Fields**

Partner ID: 1002 Trailblazers **Catalog Source:** APP1002

Description: Customer - Apparel 1002

Data Source Type

Flat File

xCBL File

Upload Sample File

***First Line:** Headings

***Subsequent Lines:** Data

***Source Data Object:** APP1002

Comment:

For Source Data Object, enter partner name to be used as a source in mapping (e.g. 1001_TRAIN).

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 your 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. This field applies to flat files only.

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. This field applies to flat files only.

Subsequent Lines

Specify if subsequent lines of the file contain data or nothing.

Data is used for determining the field type and length from the sample file.

Note. This field applies to flat files only.

Source Data Object	Enter a unique name, up to 30 characters. For example, use the partner ID and catalog source, such as 1001_OFFICESUPPLIES.
Flat File and xCBL	This field creates a source data object for Data Transformer and is used as a source for the catalog map definition.
By	Select the file type.
Created Date Time and Last Update Date Time	Displays the user ID of the person who created or updated this catalog source.
Upload Sample File	<p>Displays the date and time that this catalog source was created and updated.</p> <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.

Source Definition
Source Fields

Partner ID: 1002 Trailblazers
Catalog Source: APP1002

Source Fields		Customize Find View All		First	1-6 of 6	Last
	Field Name	Field Type	Field Length	Decimal Positions		
1	OFFERING ID	Character	32	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
2	OFFERING NAME	Character	64	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
3	CATEGORY	Character	32	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
4	UOM	Character	32	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
5	PRICE	Number	10	5	<input type="button" value="+"/>	<input type="button" value="-"/>
6	CURRENCY CODE	Character	3	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

[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.

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*.

Importing Source Data

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

- Import partner source data into PeopleSoft Catalog Management.
- 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 30](#)

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 PeopleSoft Catalog Management. Once imported, the data is available to be transformed and loaded into the enterprise catalog.

Pages Used to Import Source Data

Page Name	Object Name	Navigation	Usage
Import Catalog Sources	EOCM_DS_LOAD_1	Catalog Management, Catalog Management Home Page, Import Catalog Source Catalog Management, Catalogs, Import Catalog Sources	Import partner offering data from a partner source 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.

Import History						
		Customize Find 		First <input type="checkbox"/> 1 of 1  Last		
SeqNum	Attached File	Status	Upload	View File	Import	View Errors
1	Customer_Catalog_Offering_Sample_Data_Apparel_1002.csv	Success	<input type="button" value="Upload"/>	<input type="button" value="View File"/>	<input type="button" value="Import"/>	<input type="button" value="View Errors"/>

[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.

Note. The Partner ID and Catalog Source values, displayed at the top of the page, are based on the source layout you selected on the Import Catalog Sources Search page.

To import a file:

1. Click the Add File button to add a new row.
The next sequence number appears in the SeqNum field.
2. Click the Upload button.

Browse to select the source 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 *Uploaded*.

Note. The View File and Import buttons are now active.

3. Click the Import button to import the offering data into PeopleSoft Catalog Management.

A process request is submitted. Click the Process Monitor link to monitor the status of the request. The status of the file changes to *Success* when the file has been successfully imported. Click the Refresh button to update the status. The imported data can be reviewed by clicking the View File button.

If an error occurs, the status is updated to *Error* when you click the Refresh button. The View Errors button becomes active. Click it to display the Data Source Import Errors page. Once the errors have been corrected, you can delete the row from the import log, add a new row, and begin the process of importing the source file again.

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.

See Also

[Chapter 6, “Importing Partner Source Files,” Defining Catalog Source Layout, page 33](#)

PeopleTools 8.44 PeopleBook: PeopleCode Developer’s Guide.

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler.

Viewing and Correcting Import Errors

Access the Data Source Import Error Details page.

Partner ID, Catalog Source Values are based on the information from the Import Catalog Sources page. and **Sequence Number**

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.

Once you have viewed the import errors, open the source file and make the necessary changes, or ask the partner to make the corrections and then reload the file.

See Also

PeopleTools 8.44 PeopleBook: PeopleCode Reference.

CHAPTER 7

Mapping, Transforming, and Loading Partner Source Data

This chapter discusses how to:

- Define catalog maps.
- Transform and load data.

Note. These activities 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 30](#)

Defining Catalog Maps

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

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

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 the following tasks in PeopleSoft 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 your 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 your 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 PeopleSoft 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 your 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 PeopleSoft Data Transformer Map Rules page, you need to update permissions for the delivered roles or assign additional roles.

See Also

PeopleSoft Data Transformer for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook, “Preparing to Create Maps”

PeopleTools 8.44 PeopleBook: PeopleTools Security.

Pages Used to Define Catalog Maps

Page Name	Object Name	Navigation	Usage
Define Catalog Map - Map Information	EOEW_MAP_DEFN	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.
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.
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 your data based on the defined 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.

Defining Map Information

Access the Define Catalog Map - Map Information page.

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

Custom Map MOUNT1002

Name:

***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 PeopleSoft Application Designer before attempting to load the defined map.

See Also

[Chapter 6, “Importing Partner Source Files,” Defining Catalog Source Layout, page 33](#)

Defining Map Field Details

Access the Define Catalog Map - Map Field Detail page.

Map Information
Map Field Detail
Map Edit
Preview Map Result
Comments

Custom Map
MOUNT1002
Procurement - Mountain 1002

Name:
MOUNT1002

Data Object

Source:	MOUNT1002
Target:	EOCM_EPRO_SCH
Target Schema for ePro	

Error Handling

No error handling needed

Map Field Details
Customize | Find | View All
First
1-5 of 35
Last

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	

Apply AutoMapper
Synchronize fields

[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 the following:

Source Input Type

Select from:

Source: Select if the value is from the source file. You are prompted to select a source prompt field from the source file.

Constant: Select if the value is a constant value, then enter that value.

Default: Select to use a default value, then select a source prompt. Click the Default link to access the Set Target Field Default page.

Transformation: 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.

Translation Set: 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.

Source Prompt	Select a source prompt based on your 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 your 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> .

See Also

PeopleSoft Data Transformer for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook, “Preparing to Create Maps”

Performing Map Edits

Access the Map Edit page.

The screenshot shows the 'Map Edit' page with the following details:

- Header:** Map Information, Map Field Detail, **Map Edit** (highlighted), Preview Map Result, Comments.
- Custom Map:** MOUNT1002, Name: Procurement- Mountain 1002.
- Data Object:** A table with two rows:

Source:	MOUNT1002	MOUNT1002
Target:	EOCM_EPRO_SCH	Target Schema for ePro
- Map Edits:** A table with columns: *Source input value, Detail, Add. It shows one entry: 1, with a search icon. Buttons for Detail, Add, and navigation (First, Last, 1 of 1) are also present.

Map Edit page

Select a new source input value to replace or add to your 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.

See Also

PeopleSoft Data Transformer for Financials, Enterprise Service Automation and Supply Chain Management 8.8 PeopleBook, “Preparing to Create Maps”

Previewing Map Results

Access the Preview Map Results page.

Click the Preview button to view a subset of your mapped data based on your 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 PeopleSoft 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.

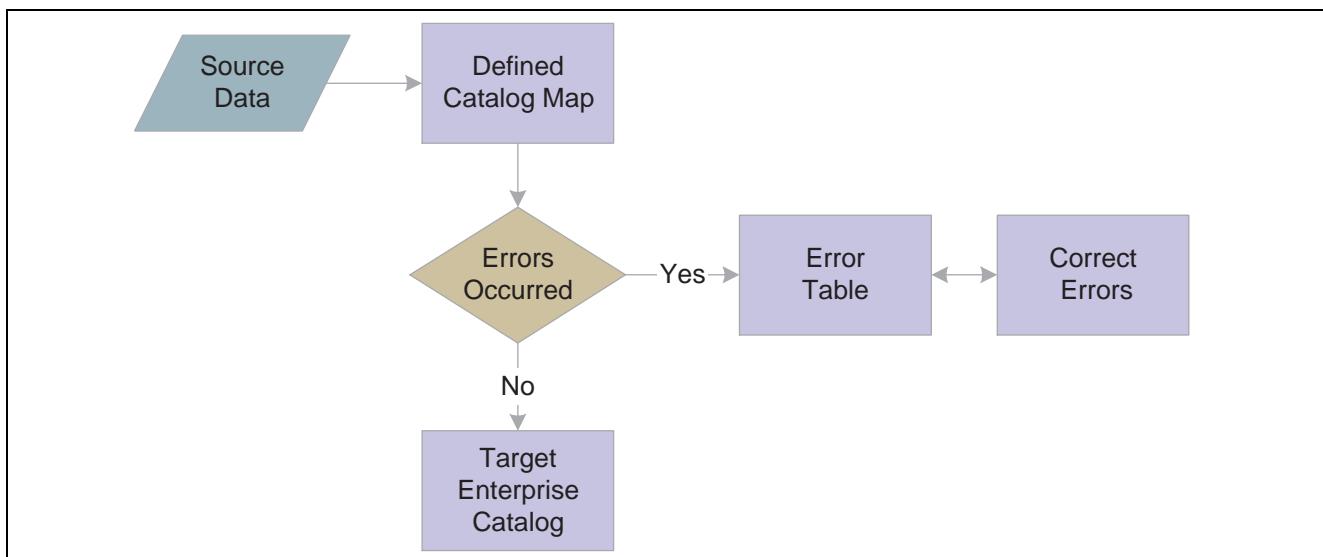
- Full load.

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 data process:



Transformation and loading of source data

See Also

[Chapter 7, “Mapping, Transforming, and Loading Partner Source Data,” Defining Catalog Maps, page 39](#)

Pages Used to Transform and Load Data

Page Name	Object Name	Navigation	Usage
Load Catalog Map	EOCM_RUN_ETL	Catalog Management, Catalog Management Home Select an enterprise catalog. Select a partner catalog. Load Catalog Map	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.

Transforming and Loading Offering Data

Access the Load Catalog Map page.

Load Catalog Map

User ID: ENTMGR_PRO

Run Control ID: RUN_MAP

Map Parameters

SetID:	SHARE	
Catalog ID:	MOUNTAIN	
Partner ID:	1002 Trailblazers	
Catalog Map Object:		
Target Load Option:	Incremental Update	<input type="checkbox"/> Remove data from Source

Run Map

[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.

Catalog Map Object Select the catalog map defined for this partner source file.

Target Load Option Select from:

- *Incremental Update*
- *Full Load*
- *Error Recycle Only*

Remove Data From Source Select if you no longer require this source data.

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.

See Also

[Chapter 2, “Understanding PeopleSoft Catalog Management,” Versioning, page 9](#)

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

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

Pages Used to Create Categorization Rules

Page Name	Object Name	Navigation	Usage
Maintain 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 Categorization Rules page.

Categorization Rule ID: OFF_DEF **Set as Default**

Categorization Rule Name: Office Supplies Default Rule

Description: For Office Supplies Catalogs

Catalog Type: Procurement Catalog

Conditions for matching Partner Offerings

Priority	*Categorization Field	Categorization Field	
1	Manufacturing ID	AND	Manufacturing Part Number
2	Vendor Item Description		

Conditions for matching Catalog Categories

Priority	*Categorization Field
4	Category Code
2	Category Description

[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.

(Optional) Operator

Select a logical operator. Required to add an additional field to your 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.

(Optional) Categorization Field

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 15](#)

Defining Category Substitutions

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

Pages Used to Define Category Substitutions

Page Name	Object Name	Navigation	Usage
Maintain 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.

Categorization Substitution ID:	OFFICE	<input checked="" type="checkbox"/> Set as Default
Substitution Name:	Office Supplies	
Description:	Categories relating to office supplies	

Substitutions for Categorization		
Source Category (like)	Target Category	Category Name
Laptops	NOTEBOOKS	Notebook Computers
Colored pencils	CRAYONS	Crayons
Pen sets	PEN_PENCIL	Pen or pencil sets
Desks	OFF_FURN	Office furniture

[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	Object 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.

Categorize Offerings

SetID: SHARE

Catalog ID: MOUNTAIN Mountaineering

Partner ID: 1002 Trailblazers

Version: 1

Categorization Rule ID: OFF_DEF

Categorization Substitution ID: OFFICE

Max Rows: 1 to 38 of 38

Partner Offerings		Customize Find 
Offering Info	Partner Offering Info	
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.

Categorize Offerings

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

Max Rows:     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 the following:

- *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

New: This offering has never been offered by this partner.

Updated: This offering already exists for this partner, but the data has changed.

Unchanged: There is no change to this offering compared to when it was loaded in a prior version.

Deleted: This offering was included in a prior load, but not in this load, if a full load was performed.

Note. If a full load was performed, the offering state for all partner offerings is either *New* or *Deleted*.

Message Text

Blank until categorization is run.

Run Categorization

Click to run the categorization.

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

Note. If the offering status of the selected partner's offerings version is either *Staged* or *Production* the Run Categorization button is not displayed.

See Also

PeopleTools 8.44 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 PeopleSoft Supply Chain Management.

Pages Used to Review Categorization Results

Page Name	Object Name	Navigation	Usage
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.
Choose Category	EOCM_CHOOSECAT	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.

Review Categorization Results

Catalog ID: MOUNTAIN
Partner ID: 1002
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
<input type="checkbox"/>		

Customize | Find | 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>
Updated	Offerings that have been changed since the previous load version.	Review partner offering updates and associations.

Status	Description	Action
Unchanged	Offerings that have no changes between this load and the previous load version.	Review partner offerings associations.
Deleted	Offerings that do not exist in this load, but existed in a previous load version. Note. Used only when the file was loaded using the Full Load option.	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 your 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.

3. Click the Assign Partner Offerings to Offerings button.

Note. Refresh the page to view your 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:

Message Text	Description
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's 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 the following 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 review offerings by the following 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 53](#)

Updating Partner Offering Details

Access the Partner Offering Details page.

Partner Offering Details

Item ID:	CMP-DG
Item Description:	Digital Compass
Effective Date:	10/24/2002 <input type="button" value="B1"/>
Status:	A <input type="button" value="Search"/>
Vendor Item Description:	Digital Compass
Vendor Item ID:	CMP-DG
Unit Of Measure:	EA
Category Description:	COMPASSES
Category Code:	COMPASSES
Vendor Price:	30.00000
Currency Code:	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.

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 the following:

- 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.

Catalog Offering Details

Catalog ID: MOUNTAIN	Mountaineering
Offering ID: AXE-LW	Lightweight 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"/>	

Catalog Offering Details page

Associate an existing catalog category with the selected catalog offering.

Choosing Partner Offering Categories

Access the Choose Category page.

Choose Category

Catalog ID: MOUNTAIN	Partner ID: 1001	Version: 1
-----------------------------	-------------------------	-------------------

Left | Right

[Global Categories](#)

- [MOUNTAIN](#)
 - [CLIMBING EQUIP - Climbing Equipment](#)
 - [HIKING EQUIP - Hiking Equipment](#)
 - [SNOW GEAR - Snow Gear](#)
 - [SNOW SPORTS EQUIP - Snow Sports Equipment](#)
- [Proposed Categories](#)
- [Unknown Category](#)
- [Unapproved Categories](#)

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

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 your 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 your results. When you are satisfied, the partner offerings are ready for approval.

See Also

PeopleTools 8.44 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	Object 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.

Approve Proposed Categories and Catalog Offerings

Catalog ID: ANNUALTRAINING Annual Corporate Training
Partner ID: 1004
Version: 1

SelectAll
UnSelectAll
Approve Offerings/Categories

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

Reject	Category ID	Category Name	Category Code	Category Hierarchy ID
<input type="checkbox"/>				JOB CODE

SelectAll
UnSelectAll
Max Rows: 300 1 to 9 of 9

▼ Proposed Catalog Offerings
Customize | Find |

Reject	Offering ID	Offering Name
<input type="checkbox"/>	11011	Snow Sports Basics
<input type="checkbox"/>	11022	Advanced Snow Sports
<input type="checkbox"/>	11765	Camping Basics

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 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

Page Name	Object Name	Navigation	Usage
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.

Stage Partner Offerings

SetID: SHARE
Catalog ID: MOUNTAIN
Partner ID: 1002
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 8.44 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 30](#)

Pages Used to Browse Staged Offerings

Page Name	Object Name	Navigation	Usage
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.

Browse Staged Partner Offering

Select the Offering Prices button for further information on that partner's offering, including pricing and Unit of Measure.

Catalog ID:	MOUNTAIN	Mountaineering	Catalog Version: 2
Partner ID:	1001	Camper's Warehouse	
Item ID:	CMP-DG		
Item Description:	Digital Compass		

Categories for this Offering.		Customize Find View All First 1 of 1
Category ID	Category Name	
1 COMPASSES	Compasses	

Partner listings for this Offering.							Customize Find View All First 1 of 1 Last
Partner ID	Name	Vendor Item Description	Effective Date	Status	Offering Prices	Offering Details	
1001	Camper's Warehouse	Digital Compass	10/24/2002	Active	Offering Prices	Offering Details	

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

Browse Staged Partner Offering page

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 page and view details for the selected offering.

Browsing Staged Partner Offerings by Hierarchy

Access the Browse Staged Partner Offerings by Hierarchy page.

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 button to see offering details for that partner.

Catalog ID:	MOUNTAIN	Mountaineering
Category Hierarchy ID:	MOUNTAIN	Mountaineering

[Left](#) | [Right](#)

📂 [MOUNTAIN - Mountaineering](#)

- ➕ [CLIMBING EQUIP - Climbing Equipment](#)
- ➕ [HIKING EQUIP - Hiking Equipment](#)
- 📂 [SNOW GEAR - Snow Gear](#)
 - 📂 [HATS/CAPS - Hats and Caps](#)
 - 📁 **JACKETS/VESTS - Jackets and Vests**
 - 📂 [MITTENS/GLOVES - Mittens and Gloves](#)
 - 📂 [SNOW BOOTS - Snow Boots](#)
 - 📂 [SOCKS - Socks](#)
 - 📂 [WARMERS - Warmers](#)
- ➕ [SNOW SPORTS EQUIP - Snow Sports Equipment](#)

Catalog Offerings			Customize	Find		First		1-2 of 2		Last
Item ID	Item Description	Partner Offerings								
1 JKT-DWN	Down Jacket	Partner Offerings								
2 VST-DWN	Down Vest	Partner Offerings								

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

[Browse Staged Partner Offerings by Hierarchy page](#)

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.

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 69.](#)

Browsing Staged Enterprise Catalog Offerings by Hierarchy

Access the Browse Enterprise Catalog Offerings by Hierarchy page.

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 70.](#)

CHAPTER 10

Producing and Syndicating Enterprise Catalogs

This chapter discusses how to:

- Move catalogs to production.
- Browse production offerings.
- Roll back production catalogs to a previous version.
- Syndicate catalogs.

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 PeopleSoft 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 PeopleSoft Catalog Management homepage, version three is listed as the working copy.

Page Used to Move Catalogs to Production

Page Name	Object Name	Navigation	Usage
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.

Move Catalog to Production

SetID:	SHARE	
Catalog ID:	MOUNTAIN	Mountaineering
Catalog Version:	2	

Run Move to Production Process

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

Move Catalog to Production page

Click Run Move to Production Process to move your 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 8.44 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 30](#)

Pages Used to Browse Production Offerings

Page Name	Object Name	Navigation	Usage
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.
Partner Offering Prices	EOCM_PROD2_SEC	<ul style="list-style-type: none"> Click the Offering Prices link on the Browse Production Enterprise Catalog by Offering page. Click the Offering Prices link on the Browse Production Partner Offering page. 	View pricing information for the selected catalog or partner offering.
Partner Offering Details	EOCM_BRWSDTP_P_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 information for the selected partner offering.

Browsing Production Partner Offerings

Access the Browse Production Partner Offering page.

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 69.](#)

Browsing Production Partner Offerings by Hierarchy

Access the Browse Production Partner Offerings by Hierarchy page.

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 70.](#)

Browsing Production Enterprise Catalog by Offering

Access the Browse Production Enterprise Catalog by Offering page.

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 69.](#)

Browsing Production Enterprise Catalog Offerings by Hierarchy

Access the Browse Production Enterprise Catalog by Hierarchy page.

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 70.](#)

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

Page Name	Object Name	Navigation	Usage
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.

Rollback Catalog

SetID:	SHARE	
Catalog ID:	MOUNTAIN	Mountaineering
Catalog Version:	2	
Rollback Version:	<input style="width: 20px; height: 20px;" type="button" value="▼"/>	
<input style="border: 1px solid black; padding: 2px 10px; width: 150px;" type="button" value="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 8.44 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

Page Name	Object Name	Navigation	Usage
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.

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> .
Note. If flat file is selected, the category hierarchy structure is not included.	
Filename	Enter a description for the syndicated file.
Syndication Locale	Select the distribution location for your 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 8.44 PeopleBook: PeopleSoft Process Scheduler.

CHAPTER 11

Maintaining Enterprise Catalog and Partner Offerings

This chapter 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 28](#)

[Chapter 5, “Creating Enterprise Catalog Definitions,” Assigning Partners and Granting Privileges, page 30](#)

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

Page Name	Object Name	Navigation	Usage
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.

Maintain Enterprise Catalog Data

Catalog ID:	MOUNTAIN	Mountaineering	Catalog Version:	2																					
Item ID:	CMP-DG																								
*Item Description:	Digital Compass																								
Long Description:																									
Categories for this Offering. Customize Find View All First 1 of 1 Last <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 15%;">Category ID</th> <th style="width: 40%;">Category Name</th> <th style="width: 45%;">Primary Category</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>COMPASSES</td> <td><input checked="" type="checkbox"/> </td> </tr> </tbody> </table> Partner listings for this Offering. Customize Find View All First 1-2 of 2 Last <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="width: 15%;">Partner ID</th> <th style="width: 25%;">Name</th> <th style="width: 25%;">Vendor Item Description</th> <th style="width: 25%;">Vendor Item ID</th> <th style="width: 10%;">Offering Details</th> </tr> </thead> <tbody> <tr> <td>1001</td> <td>Camper's Warehouse</td> <td>Digital Compass</td> <td>CMP-DG</td> <td>Offering Details</td> </tr> <tr> <td>1002</td> <td>Trailblazers</td> <td>Digital Compass</td> <td>CMP-DG</td> <td>Offering Details</td> </tr> </tbody> </table>					Category ID	Category Name	Primary Category	1	COMPASSES	<input checked="" type="checkbox"/>	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
Category ID	Category Name	Primary Category																							
1	COMPASSES	<input checked="" type="checkbox"/>																							
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 PeopleSoft 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	Object 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.

Maintain Partner Data

Catalog ID: MOUNTAIN	Catalog Version: 2
Partner ID: 1001	Load Version: 1
Item ID: PK-LTL	
Vendor Item ID: PK-LTL	

Offering Details

Find View All First 1 of 1 Last + -	
Effective Date: 10/24/2002 [i]	Status: <input type="text" value="A"/> [x]
Vendor Item Description: Adult Lightweight Top Loading Pack	
Supplier Offering Description: Adult Lightweight Top Loading Pack	
Category Description: BACKPACKS	
Category Code: BACKPACKS	
Manufacturer Part ID: <input type="text"/>	
Manufacturer Part Number: <input 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 lists common elements and 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

Page Name	Object Name	Navigation	Usage
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.

Compare Versions
[View Report](#)

Catalog ID: CAMPING

Partner ID: 1001

Report ID: 1001_V2

Camping

Camper's Warehouse

Catalog Version: 2

Partner Version: 2

Description

Comparing Item ID and Vendor Price in version 2 to version 1 for partner 1001 - Camper's Warehouse.

Compare partner version 2 to partner version ▼

[SelectAll](#) [UnSelectAll](#)

Select Attributes

	Field Name
<input checked="" type="checkbox"/>	Item ID
<input type="checkbox"/>	Item Description
<input type="checkbox"/>	Category Code
<input type="checkbox"/>	Category Description
<input type="checkbox"/>	Supplier Offering Description
<input type="checkbox"/>	Vendor Item Description
<input checked="" type="checkbox"/>	Vendor Price
<input type="checkbox"/>	Vendor Item ID
<input type="checkbox"/>	Unit Of Measure
<input type="checkbox"/>	Currency Code

[View All](#) grid [First](#) ◀ 1-10 of 34 ▶ [Last](#)

[Generate Report](#)

Compare Versions page

Compare partner version *n* to partner version *n* 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 8.44 PeopleBook: PeopleSoft Process Scheduler.

Viewing Comparison Reports

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

Page Used to View Comparison Reports

Page Name	Object Name	Navigation	Usage
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 ID: CAMPING **Camping** **Catalog Version:** 2

Partner ID: 1001 **Camper's Warehouse** **Partner Version:** 2

Report ID: 1001_V2

Numeric Filter

Select from a list of numeric fields to filter the results.

Numeric Field:

Enter Filter Criteria

Amount Difference 10.000

Percent Difference 10.000

[View Filtered Rows](#) [View All Rows](#)

All Rows

Results

Vendor Item ID	AIRMAT- DB	Double Air Mattress
Item ID		AIRMAT- DB
Vendor Price	16	10

Max Rows 300 1 to 62 of 62

[View Report page](#)

If you won't 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.

Field Name	Amount Difference	Percent Difference
Item ID	6.000	
Vendor Price		60.000

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 83](#)

APPENDIX A

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 PeopleSoft 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 E-mail 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 8.44 PeopleBook: PeopleTools Security.

Setting Permissions

PeopleSoft delivers the EOCLM1500 (partner users), and EOCLM6500 (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 the following:

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 your own permission lists for partner users and enterprise catalog managers, you must also perform these steps for those lists.

See Also

PeopleTools 8.44 PeopleBook: PeopleTools Security.

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 your own 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 8.44 PeopleBook: PeopleTools Security.

Updating SMTP Settings

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

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler.

APPENDIX B

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 PeopleSoft Catalog Management. If a registered partner terminates the partnership, the following 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 PeopleSoft Catalog Management partner status to *Inactive* and deletes partner users from their associated catalogs.

PeopleSoft delivers a PeopleSoft Process Scheduler recurrence schedule, EOCD 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 EOCDM 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 EOCDM_TRDP_AE process:

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

Server Name	Enter a valid PeopleSoft Process Scheduler server name.
Recurrence Name	Select <i>EOCDM Daily Partner Cleanup</i> .
Component	Select <i>AE_REQUEST</i> .
Process Groups	Select <i>EOCDMALL</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 *EOCDM_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 8.44 PeopleBook: PeopleSoft Process Scheduler

PeopleTools 8.44 PeopleBook: PeopleSoft Application Engine

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.
	In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.
	In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.
	In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

business unit	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
control table	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
cost profile	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost row	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
current learning	A cost transaction and amount for a set of ChartFields.
data acquisition	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data elements	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
dataset	Data elements, at their simplest level, define a subset of data and the rules by which to group them.
	For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.
delivery method type	In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
directory information tree	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
document sequencing	
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.
event propagation process	In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template

In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group

In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server

Abbreviation for *PeopleSoft MultiChannel Framework server*. Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity

In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL

Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring

Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook

In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency

The ability to process transactions in a currency other than the business unit's base currency.

national allowance

In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree

A tree that is based on a detail structure, but the detail values are not used.

pagelet

Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant

In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object

Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner

A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle

In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item

In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

record output VAT flag	on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
reference data	Abbreviation for <i>record output value-added tax flag</i> .
reference object	See <i>record input VAT flag</i> .
reference transaction	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
relationship object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
regional sourcing	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
remote data source data	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
REN server	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
requester	Data that is extracted from a separate database and migrated into the local database.
role	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
role user	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
roll up	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
run control	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
run control ID	In a tree, to roll up is to total sums based on the information hierarchy.
	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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