PeopleSoft®

Committing PeopleSoft Supply Chain Planning Updates 8.8 PeopleBook

December 2003

Committing PeopleSoft Supply Chain Planning Updates 8.8 PeopleBook
SKU FSCM88CPU-B 1203

Contents

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.
Italics	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 0, not the letter *O*.
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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	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. 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: (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.
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word *See*. 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

Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Common elements in this PeopleBook.

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

PeopleSoft Application Fundamentals

The *Committing PeopleSoft Supply Chain Planning Updates 8.8 PeopleBook*provides you with processing information regarding PeopleSoft Supply Chain Planning updates for the PeopleSoft Supply Chain Management system. However, additional, essential information describing the setup and design of the system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

If your supply planning system resides in PeopleSoft EPM, refer to the following companion PeopleBooks.

- *PeopleSoft Application Fundamentals for FIN, ESA, and SCM 8.8 PeopleBook*
- *PeopleSoft 8.8 SP1 Enterprise Warehouse PeopleBook*
- *PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook*
- *PeopleSoft 8.8 SP1 Demand Planning PeopleBook*
- *PeopleSoft 8.8 SP1 Inventory Policy Planning PeopleBook*

If your supply planning system does not reside in PeopleSoft EPM, refer to the following companion PeopleBooks.

- *PeopleSoft 8.8 Supply Chain Management Integration PeopleBook*
- *PeopleSoft 8.8 Application Fundamentals for FIN, ESA, and SCM PeopleBook*

Common Elements Used in This PeopleBook

As of Date The last date for which a report or process includes data.

Description Freeflow text up to 30 characters.

Effective Date Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective

	date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
EmplID (employee ID)	Unique identification code for an individual associated with your organization.
Language or Language Code	The language in which you want the field labels and report headings of the reports to print. The field values appear as you enter them. Language also refers to the language spoken by an employee, applicant, or non-employee.
Process Frequency group box	Designates the appropriate frequency in the Process Frequency group box: Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Always executes the request every time the batch process runs. Don't Run ignores the request when the batch process runs.
Report ID	The report identifier.
Report Manager	This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	This button takes you to the Process List page, where you can view the status of submitted process requests.
Run	This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Run Control ID	A request identification that represents a set of selection criteria for a report or process.
User ID	The system identifier for the individual who generates a transaction.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.
Short Description	Freeflow text up to 15 characters.
Standard Unit of Measure (UOM)	A type of unit used for quantifying in PeopleSoft systems, and usually associated with items. Depending on the application, units of measure might describe dimensions, weights, volumes, or amounts of locations, containers, or business activities. Examples include inches, pounds, work hours, and standard cost dollars.
Unit (Business Unit)	An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

CHAPTER 1

Getting Started with Committing PeopleSoft Supply Chain Planning Updates

This chapter provides an overview of Committing PeopleSoft Supply Chain Planning Updates to the Transaction System and discusses:

- PeopleSoft Supply Chain Planning Update Process Flow.
- Implementation.

PeopleSoft Supply Chain Planning Update Process Flow

PeopleSoft 8.8 Supply Planning enables you to publish supply plans to PeopleSoft SCM by replicating optimization table rows for a specific planning instance. The PeopleSoft Supply Planning Post Updates process validates the recommended supply plan changes against the actual PeopleSoft Supply Chain Management supply plan being executed. Valid changes once approved can automatically update the executing supply plan.

Implementation

There are no table-loading implementation steps to commit supply chain planning updates. In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook

CHAPTER 2

Posting PeopleSoft Supply Chain Planning Updates to the Transaction System

This chapter provides an overview of posting PeopleSoft Supply Chain Planning updates to the transaction system and discusses how to:

- Post PeopleSoft Supply Planning updates to the transaction system.
- Create PeopleSoft Supply Planning Updates reports.
- Display item useup information.
- Reset the locks for the Post Updates process (PL_POST).

Posting Planning Updates to the Transaction System

Once you create a workable plan in PeopleSoft Supply Planning and transfer the planning instance to PeopleSoft SCM, create the recommendations into the PeopleSoft transactional system using the Post Updates process. There, the recommendations are distributed into the various components as planning updates, where you can review them. You can also select to have updates automatically approved, where applicable. They should be applied only where necessary.

You can also use PeopleSoft APS to create and post updates to PeopleSoft SCM.

See *PeopleSoft Supply Chain Management Integration 8.8 PeopleBook*, “Integrating with Supply Chain Business Modeler”.

Understanding the Post Updates Process

The Post Updates process enables you to generate PeopleSoft Supply Planning updates for PeopleSoft Order Management, Inventory, Production Management, and Purchasing.

The Post Updates process performs these steps for the specified run control:

1. Locks the business unit for posting planning updates, as indicated by the business unit group associated with the planning instance.

   Two posts cannot run concurrently for the same business unit and data type. If the business unit is locked by another process, the system displays an error in the message log.

2. Calculates the item horizons.
3. Processes all of the selected data types.

   For each data type, the process:

   a. Selects data for processing.
   b. Initializes the staging and exception tables.
   c. Validates changes.
   d. Approves valid orders.
   e. Updates staging and exception tables.
4. Unlocks the planning instance data type.

Multi-Process Post Update

You can post updates using the Post Updates process (PL_POST) or using the Plan Multi-Process Post job (PL_POSTM), which separates the Post Updates process into several child processes to enable concurrency. Multi-process post updates enables you to use multi-CPU servers or schedule child processes to occur on different servers.

PeopleSoft Supply Planning uses JobSet functionality to enable you to schedule a combination of serial and parallel jobs. When you select the Multi-Process Post Update job on the PeopleSoft Process Scheduler page, the system schedules the processes to run serially or parallel, as needed. If a process fails, the system determines which, if any, subsequent processes it should run. For example, if the Multi-Process Post Update Start process (PL_POST_MPS) process fails, the system does not run subsequent processes. However, if the Post Production Updates process (PL_POST_PR) fails, the system still runs the Post Sales Order Updates process (PL_POST_SO), as the remaining processes in the Multi-Process Post Update job can run independently of the others. If any single process fails, you can correct the situation, then rerun the Post Updates process for the corrected section.

Calculating Item Horizons

The process calculates these item-specific horizons:

- Planning Time Fence Date = Current Date + Planning Time Fence.
- Action Message Cutoff Date = Current Date + Action Message Cutoff Fence.
- Released Order Fence Date = Current Date + Released Order Fence.
- Firmed Order Fence Date = Current Date + Firmed Order Fence.

  Released and firmed dates are used with planned production only.

Selecting Data for Processing

The Post Updates Process considers the following when selecting data for processing:

Planned Order Status

Planned orders must have a status of *Planned* or *Firmed.* Canceled planned POs are posted for vendor scheduled items, if the orders were previously posted to the transaction system. Actual orders are not subject to this validation.

Actual Order Change

The Post Updates process selects only actual orders that have changed. The process compares the planning instance order against the actual order in the transaction system and selects only those orders where changes occurred.

Planned orders are not subject to this restriction.

Action Message Cutoff Date

If you did not select the Ignore Cutoff option on the Post Updates page, the process selects only those records where the planning-suggested due date or actual due order date are less than or equal to the item’s action message cutoff date.

Planned orders do not have an actual order due date.

Initializing Staging and Exception Tables

The Post Updates process deletes records from the staging and exception tables based on the initialization options. If you selected *All by Selected Planned By* in the Items field on the Post Updates page, the process deletes all of the records if you also selected *All Data Types* in the Types field, or if you selected *Posted Data Types* in the Types field and the corresponding order types were selected for processing. The process deletes records for only those items matching the Planned By option criteria that you selected on the Post Updates page.

If you selected *Selected by Planning Instance* in the Items field on the Post Updates page, the process deletes all of the records for items that it locates in the PL_BU_ITEMS table, if you also selected *All Data Types* in the Types field, or if you selected *Posted Data Types* in the Types field and the corresponding order types were selected for processing. The process deletes records for only those items matching the Planned By option criteria that you selected on the Post Updates page.

Validating Changes

If the Post Updates process encounters an error while validating changes made in PeopleSoft Supply Planning, it writes the error to the Review Post Errors Inquiry for the data type. You must make the appropriate changes manually in the transaction system.

Note. If an order date change is less than the item defined reschedule in or reschedule out range, use the Post Updates page to define how the Post Updates process handles the order date change. The Post Updates process can mark the change in error, approve the order automatically, ignore the order, or accept the order change through standard approval and validation.

This table lists the Post Updates process validation rules for order types:

Order Type	Valid Changes	Exceptions
Actual Purchases	• Cancel a schedule. • Change a schedule due date.	• Tolerance violation occurs and you request errors. • Existing line or schedule status is *Canceled* or *Closed*. • Existing PO header status is *Canceled* or *Closed*. • Existing PO header is being held. • PO schedule has been deleted. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Order quantity changes in the planning engine.
Planned Purchases	Add a planned order.	Planned order created in a prior planning instance has been converted to a PO.

Order Type	Valid Changes	Exceptions
Actual Production	• Cancel an order. • Change the header start time, start date, end time, or end date. • Freeze an order. • Change an operation start time, start date, end time, or end date. • Substitute a component.	• Tolerance violation occurs, and you request errors. • Item is a fast MRP item and the proposed header start date and time is not valid for the manufacturing calendar or five day work week. • Item is a fast MRP item and the proposed header end date and time is not valid for the manufacturing calendar or five day work week. • Order status is greater than in-process and a change is proposed to the header. • Order changes in the transaction system, denoted by tracking original field values (date, frozen flag, and quantity). • A pick plan is generated for the order. • Order is deleted from the transaction system. • Component substitute is not listed on the bill of materials (BOM) as a valid substitute. • Operation start date and time or end date and time is invalid.

Order Type	Valid Changes	Exceptions
Planned Production	• Add a planned order. • Substitute a component.	• Item is a fast MRP item and the proposed header start date and time is not valid for the manufacturing calendar or five day work week. • Item is a fast MRP item and the proposed header end date and time is not valid for the manufacturing calendar or five day work week. • Production area and item combination is invalid. • Component substitute is not listed on the BOM as a valid substitute. • Operation start date and time or end date and time is invalid. • Operation does not exist on engineering routing. • Component is invalid. • Planned order created in a prior planning instance has been converted to a production order.
Actual Transfers	• Cancel an order. • Reschedule the scheduled arrival date and time. • Change an order priority.	• Tolerance violation occurs and you request errors. • Order has been shipped, deleted, closed, or canceled. • Order changes within the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. If the priority, frozen option, schedule dates, or quantity have been modified since the optimization tables were loaded, the Post Updates process writes an exception. • Order quantity changed in the planning engine.
Planned Transfers	Add a planned order	Planned order created in a prior planning instance has been converted to a transfer order.

Order Type	Valid Changes	Exceptions
Sales Orders	Change the scheduled ship date and time.	• Tolerance violation occurs and you request errors. • Order does not exist. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Order is not open. • Order is canceled by the planning engine.
Quotes	Change the scheduled ship date and time.	• Tolerance violation occurs and you request errors. • Order does not exist. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Quote is converted. • Order is not open. • Order canceled by the planning engine.

Order Type	Valid Changes	Exceptions
Buying Agreement	Change the requested ship date and time.	• Tolerance violation occurs, and you request errors. • Order does not exist. • Agreement has been converted. • Order is not open. • Order canceled by the planning engine.
Material Stock Request	Change the scheduled ship date and time.	• Tolerance violation occurs and you request errors. • Order does not exist. • Order changes in the transaction system, denoted by checking the current transaction fields against the original fields stored on the optimization table. • Order is not open. • Order canceled by the planning engine.

Updating Staging and Exception Tables

The Post Updates process inserts orders with errors into the appropriate exception table. These exceptions can be seen in the Review Post Errors Inquiry for the data type.

For valid planned orders, the process:

- Updates the existing order, if the order header exists in the staging table.

  Staging tables can be seen in the Approve Updates Workbench for the data type.
- Inserts the header and all of the valid children into the staging table, if the order header did not exist in the staging table.

For valid actual orders, the process inserts the order into the staging table. For actual purchases, sales orders, quotes, buying agreements, the process inserts only one row per distinct schedule.

The Post Updates process assigns new records in the staging tables a sequence number from the INSTALLATION_PL table. Sequence numbers are reset to 1 after the process assigns the sequence number 999,999,999. The process reserves sequence numbers as blocks by counting the number of valid records, then updating the counter by the appropriate amount, noting the first and last order number reserved.

Projected Useup

For discontinued items, the Post Updates process publishes the last date that a supply or demand has occurred (the useup date) with the final inventory balance resulting from that change in inventory position (the useup quantity on hand). For configured items, the Post Updates process publishes this data for each configuration code.

Page Used to Run the Post Updates Process

Page Name	Object Name	Navigation	Usage
Post Updates	PL_POST_REQ	Supply Planning, Commit Plan, Planning, Post Updates	Extract new orders and changes to existing orders from the planning instance. Validate and stage orders for application to the transaction system.

Running the Post Updates Process

Access the Post Updates page.

Common Information

Planned By

Select any combination of distribution plan, material plan, or master plan items for posting. The selection determines what data is initialized and processed.

Initialize Data Types

Specify the data to include in the staging and exception tables after you run the Post Updates process. The data tables that you include are determined by the combination of values that you select in the Items and Types fields.

When you run the Post Updates process for a planning instance, you send the transaction system a set of recommended changes to the supply plan (written to the staging tables), as well as those changes that cannot be implemented due to validation errors (written to the exception tables). Use the Items and Types fields to specify how to delete the data from the previous Post Updates process. In the Items field, indicate whether you want to delete all of the prior data or delete only the data for items in the planning instance. In the Types field, indicate whether you want delete all of the prior data or only the data types that you intend to add back.

This table lists the valid combinations and the corresponding Post Updates process action:

Type Field Selection	Item Field Selection	Action
All Data Types	All by Selected Planned By	Initializes all of the data tables for all of the items that you included in the Planned By option criteria.
All Data Types	Selected by Planning Instance	Initializes all of the data tables that you included in the Planned By option criteria, but only for those items included within the corresponding planning instance.

Type Field Selection	Item Field Selection	Action
Posted Data Types	All by Selected Planned By	Initializes all of the data tables selected for posting for all of the items that you included in the Planned By option criteria.
Posted Data Types	Selected by Planning Instance	Initializes all of the data tables selected for posting that you included in the Planned By option criteria, but only for those items included within the corresponding planning instance.

Select All Click to include all of the data types that appear in the Posting Options group box for processing.

Clear All Click to exclude all of the data types that appear in the Posting Options group box for processing.

Selection Criteria Tab

Select Select to include the corresponding data type in the Post Updates processing.

Ignore Cutoff Fence Select to ignore the item's cutoff fence for the corresponding data type. If you do not select this option, the Post Updates process includes only changes and new orders that occurred prior to the calculated cutoff date.

Inside Tolerance If an order date change is less than the item defined reschedule in or reschedule out range, define the action that the Post Updates process is to take. Values are:

- *Error:* The order shows up in the Review Post Errors Inquiry for the data type. The order cannot be applied to the transaction system.
- *Approve:* The order can be applied to the transaction system. Approves the order change automatically, overriding other approval options.
- *Ignore:* The order is not posted to the transaction system and the order does not appear in the Review Post Errors Inquiry for the data type.
- *Accept:* The order can be applied to the transaction system. The change goes through standard approval and validation.

Track Time Changes Select to trigger a change order if the order is rescheduled within a single day. If this option is not selected, the order due date must move for a change order to be generated.

Validation Options Tab

Approval Options Specify whether the Post Updates process can approve changes automatically. Values are:

- *Manually Approve:* Select to approve all of the updates manually in their applicable components.
- *Auto Approve All:* Select to approve all updates automatically from the planning engine.
- *Auto Approve Within Horizon:* Select to approve all updates automatically from the planning engine based on the criteria that you define in the From Days, To Days, and Based On fields.

From Offset,To Offset and **Based On**
Enter an offset from the current date for the horizon and indicate whether the horizon is based on the *Start Date, End Date,* or *Both.* These fields are available for entry only when you select *Auto Approve Within Horizon* in the Approval Options field.

Approve Schedules
Select if you want the Post Updates process to approve orders for supplier scheduled items automatically. If you define the corresponding Approval Option as automatic, but you do not select this option, the Post Updates process does not automatically approve supplier scheduled items.

If you define the approval option as *Manually Approve*, the Post Updates process ignores this option.

Allow Violation Approval
Select if you want the Post Updates process to apply the corresponding Approval Option to planned production or transfer orders that have violations. If you want to exclude planned production or transfer orders with violations from the Post Updates approval process, you should run the Demand Violations Extract process prior to running the Post Updates process. The Demand Violations Extract process adds entries in the SPL_VIOLATIONS table for planned production and transfer orders that are pegged to a lower level supply order with a violation.

Creating PeopleSoft Supply Planning Updates Reports

After you run the Post Updates process, you can create a report to display a list of updates from the planning engine, based on the selection criteria. On the Planning Updates report, you can review the new and changed orders generated by the Post Updates process for PeopleSoft Purchasing, Production, Inventory, and Order Management.

Note. PLS4011.SQR generates the output for the Planning Updates report.

Pages Used to Create PeopleSoft Supply Planning Updates Reports

Page Name	Object Name	Navigation	Usage
Planning Updates	PL_REVPL_MSG	Supply Planning, Commit Plan, Planning, Planning Updates Report	Define the search criteria for the Planning Updates report, which enables you to review a list of planning updates generated by PeopleSoft Supply Planning.
Selection Criteria	PL_MESS_RPT	Supply Planning, Commit Plan, Planning, Planning Updates Report, Selection Criteria	Select the production, PO, inventory, and order management update reporting options for the Planning Updates report.

Defining the Planning Updates Report Search Criteria

Access the Planning Updates page.

Plan Unit Group Define the criteria to include only updates for a specific plan unit group code.

Planner Code Define your criteria to include only updates for a specific planner.

Item Define the criteria to include updates associated with specific items.

Run Click to access the PeopleSoft Process Scheduler page, where you can initiate the process to generate the Planning Updates report.

Message Selection

New Order Select to include new supply orders.

Canceled Select to include canceled orders.

Reschedule Select to include rescheduled orders.

Substitute Select to include production updates for component substitutions.

Report Options

Production Select to include production updates on the report.

Stock Requests Select to include stock request updates on the report

Transfers Select to include inventory transfer updates on the report.

Purchasing Select to include purchasing updates on the report.

Sales Orders Select to include sales order updates on the report.

Quotations Select to include quotation updates on the report.

Buying Agreements Select to include buying agreement updates on the report.

Status

Unapproved	Select to include updates that were not approved in a previous review session or during the Post Updates process
Expedite	Select to include updates that are required before the planning time fence for the item.
Approved	Select to include updates that were previously approved but not processed.
Accepted	Select to include updates that are required after the planning time fence but before the action message cutoff fence for the item.
Processed	Select to include updates that were previously approved and applied to the transaction system
Cutoff	Select to include updates for items that have updates beyond the action message cutoff fence defined for the item.
Tolerance	Select to include reschedules that occur within an interval bound by the reschedule in and out factors defined for the item. The system reports all of the orders rescheduled outside of the tolerance. Select Within Tolerance to report orders which are inside of tolerance.

Defining Production, PO, and Inventory Planning Updates Search Criteria

Access the Selection Criteria page.

Production

Production Class	Define your criteria to include updates with a specific production class. Values include: *Prdn ID* (production ID), *Prdn Sched* (production schedule), or *Both.*
Production Start Date From/To	Define the criteria to include only those updates within the specified date range.

Order Status

Entered	Select to include updates for entered orders.
Firmed	Select to include updates for firmed orders.
Released	Select to include updates for released orders.
In Process	Select to include updates for orders in process.

Transfers

Destination Unit	Specify a destination business unit to include only updates from that unit.

Destination Planner Code	Specify a destination planner code to include only updates from a specific destination planner.
Scheduled Ship Date From/To	Define your criteria to include only those updates within the specified date range.
Scheduled Arrival Date From/To	Define the criteria to include only those updates within the specified date range.

Purchases

Release Date From/To	Define your criteria to include only those updates within the specified date range.
Due Date From/To	Define the criteria to include only those updates within the specified date range.

Stock Requests

Scheduled Ship Date From/To	Define your criteria to include only those updates within the specified date range.

Customer Orders

Scheduled Ship Date From/To	Define the criteria to include only those updates within the specified date range.

Displaying Item Useup Information

This section provides an overview of item useup, and discusses how to:

- Generate a PeopleSoft Supply Planning Useup report.
- Review item useup information.

Understanding Item Useup

PeopleSoft Supply Planning enables you to plan for the end life of components and the beginning of life for their replacement components. Engineering changes, technical upgrades, and cost can create a need to replace a component.

Using PeopleSoft Supply Planning, you can:

- Specify the phase-out date of the component.
- Use up the remaining stock of the old component before introducing the new component into production.
- Plan to purchase the new component (using the effectivity date), while using the old stock, until you deplete the old component supply.

Use the Item Useup inquiry page and Planning Updates report to obtain planning information about discontinued items (including the last change in the inventory position for the item and the expected ending quantity on hand at that point) and substitute items available to fulfill remaining demand for the item.

Phase-Out Dates

PeopleSoft Supply Planning considers an item's discontinuation date to be its phase-out date. On the Define Business Unit Item - General page, select *Discontinue* in the Current or Future status fields for items that you want to phase-out and item. If you define the Current date field with the value *Discontinue,* the system uses the effective date of the status as the phase-out date. If you defined the Future date field with the value *Discontinue,* the system uses the effective date of the future status as the phase-out date.

PeopleSoft Supply Planning does not generate new supply nor does it replenish safety stock levels after an item's phase-out date. If the item is required as a component in a production ID after the phase-out date, solvers use substitutes defined on BOM to fulfill any unsatisfied demand. If no available quantity on hand exists for a substitute, the solvers create new supply for the substitute.

Post Updates Process

The Post Updates process writes useup information back to PeopleSoft SCM. For each discontinued item, the Post Updates process publishes the last date that a supply or demand has occurred (the useup date), as well as the final inventory balance resulting from that change in inventory position (the useup quantity on hand). For configured items, the process publishes this data for each configuration code.

Pages Used to Create Useup Reports

Page Name	Object Name	Navigation	Usage
Planning Useup Report	PL_USEUP_RPT	Supply Planning, Commit Plan, Planning, Planning Useup Report	Define business unit and item parameters to generate a report displaying useup items, their phase-out dates, and their substitute items.
Review Planning Useup (inquiry)	PL_USEUP_ITEMS	Supply Planning, Commit Plan, Planning, Review Planning Useup	Review item useup details, such as effectivity dates, quantity on hand at the useup date, and availability quantities of substitutes.

Reviewing Item Useup Information

Access the Review Planning Useup inquiry page.

Item ID Displays the parent item for the item being queried.

Useup Date Indicates the projected useup date based on the last change in inventory position for the item.

Phase-Out Date Indicates when useup logic should go into effect for the original component. After the phase-out date, solvers use supplies but do not replenish the stock for the original component.

Useup Quantity On Hand Displays the projected quantity on hand at the time of the projected useup date.

Quantity Available Displays the current quantity available from PeopleSoft Inventory.

Planning Date and Time Displays the date and time of the last Post Updates process.

Substitute Item Displays any valid substitute items defined on the BOM.

Component Where Used

Component ID Indicates the name of the component being used in the corresponding operation sequence.

BOM State Specifies whether the BOM is an engineering BOM or a production BOM.

BOM Type Only BOM types defined as Production are visible in PeopleSoft Supply Planning. For rework and teardown BOM types, PeopleSoft Supply Planning uses the production ID for component and operation lists.

BOM Code Displays the BOM used to generate the initial component list for the order.

Operation Sequence Indicates where in the manufacturing process you need the component. The operation sequence refers to an operation on the assembly item's routing. The default operation sequence is *0,* which is the first operation of the manufacturing process.

Define the operation sequence on the item's routing by using the Routing Definition Summary page. If you set the operation sequence for all of the items to *0,* the system assumes that all of the component items are needed at the beginning of production and therefore must be issued at the start of the first operation.

Standard UOM (standard unit of measure) Displays the item's standard UOM defined in the transaction system. The system displays all of the quantities in PeopleSoft Supply Planning in the item's UOM.

Effective Date and **Obsolete Date** Displays the effective and obsolete dates for the components on a BOM.

Substitute Items

Priority Displays the substitution item priority rank.

Substitute Item ID Displays the unique substitute item for the item. When you define substitutes for items on the Manufacturing BOMs - Components: Substitutes page, PeopleSoft Supply Planning automatically selects these substitutes when the quantity on hand for discontinued items runs out. If you do not define substitutes for items designated as discontinued, a shortage of that item might occur if demand exceeds the existing quantity on hand.

From Date and **To Date** Displays the start and end date to indicate when the substitution is valid.

Rate Indicates the quantity of the substitute item required to replace the original item in the item's standard UOM. The conversion rate can be different at the setID, business unit, and BOM levels.

Quantity Available Displays the current quantity available from PeopleSoft Inventory or the substitute item.

Resetting the Locks for the Post Updates Process

If the system encounters an error during processing for a specific update type, it locks the Post Updates process. You must reset the locks before any other request can post updates for the update type for the corresponding business unit.

This section discusses how to reset the locks for the Post Updates process.

Page Used to Reset the Locks for the Post Updates Process

Page Name	Object Name	Navigation	Usage
Reset Post Locks	PL_BU_LOCK_MAINT	Supply Planning, Commit Plan, Planning, Reset Post Locks	Select orders locked by the Post Updates process.

Selecting Locked Orders

Access the Reset Post Locks page.

Process Date Time Indicates the date and time that the Post Updates process was initiated.

Lock Status Indicates if a given update type for the specific business unit is currently locked. Update types are locked during the post update process and released if the process completes successfully.

CHAPTER 3

Committing PeopleSoft Inventory Updates

This chapter provides an overview of committing PeopleSoft Inventory updates and discusses how to:

- Review PeopleSoft Inventory post errors.
- Approve PeopleSoft Inventory updates.
- Apply PeopleSoft Inventory updates.
- Review applied PeopleSoft Inventory errors.

Note. In the documentation, the term PeopleSoft Supply Planning refers to both PeopleSoft Supply Planning Multisite Material and PeopleSoft Supply Planning Advanced Multisite Planner, unless stated otherwise.

Understanding the PeopleSoft Inventory Updates Business Process

When you run the Post Updates process (PL_POST), it generates inventory recommendations, updates, and post errors. At that time you can review, analyze, approve, and apply those inventory updates to PeopleSoft Inventory.

You can manage the PeopleSoft Inventory updates from PeopleSoft Supply Planning after you run the Post Updates process.

To process PeopleSoft Inventory updates:

1. Review the errors that occurred during the Post Updates process using the Review Inventory Post Errors component.

   When you run the Post Updates process and the system finds errors. The system generates error messages when the situation in PeopleSoft Inventory has changed from the last time that the PeopleSoft Supply Planning update was initiated. For example, PeopleSoft Supply Planning suggests canceling an interunit order, but the interunit order has already been completed in PeopleSoft Inventory.

2. (Optional) Review and approve the recommended PeopleSoft Inventory updates using the Approve Inventory Updates component.

   Use this component to manually approve the updates that you want to apply to PeopleSoft Inventory. You can automatically approve all of the changes during the Post Updates process.

3. Apply the approved PeopleSoft Inventory updates to PeopleSoft Inventory by initiating the IN Apply Planning Messages COBOL process (INPAPLAN) using the Apply Inventory Updates component.

4. Review the errors that occurred from the IN Apply Planning Messages COBOL process using the Review Apply Inventory Errors component.

When you apply the PeopleSoft Inventory updates and the system finds data errors, the system generates error messages. These error messages might have been generated, because a change in the production data occurred since you ran the IN Apply Planning Messages process or because a business rule violation occurred, such as an invalid intercompany setup.

Using PeopleSoft Inventory, you can manage these types of updates from PeopleSoft Supply Planning:

- Creation of interunit transfer orders.
- Cancellation and reschedule of interunit transfer orders and internal and external material stock requests.
- Frozen interunit transfers and material stock requests.
- Changes in demand priority associated with an interunit transfer.

Prerequisites

Before you begin to review and apply inventory updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook

Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3

Common Elements Used in This Chapter

Click the Item Search button located next to the Item ID field to access a transfer page of item-related links. On the transfer page, click the Item Search link to search for items using the Item Search Criteria page

Note. Link options on transfer pages vary depending on the component and the item with which you are working.

Note. Only items with a status of *Active* or *Discontinue* are valid.

Interunit Select this check box to view interunit order errors or updates associated with the search criteria that you selected.

Internal/External Select this check box to view internal or external material stock request errors or updates associated with the search criteria that you selected.

Reviewing PeopleSoft Inventory Post Errors

This section discusses how to:

- Search for PeopleSoft Inventory post errors.
- Review PeopleSoft Inventory post error details.

Pages Used to Review PeopleSoft Inventory Post Errors

Page Name	Object Name	Navigation	Usage
Review Inventory Post Errors - Search	DEM_EXC_SRC_INV	Supply Planning, Commit Plan, Inventory, Review Inventory Post Errors, Search	Define the search criteria for the inventory post errors that you want to review.
Review Inventory Post Errors - Details	DEM_EXC_SUM_INV	Supply Planning, Commit Plan, Inventory, Review Inventory Post Errors, Details	View the details of an inventory post error that occurred during the Post Updates process.

Searching for PeopleSoft Inventory Post Errors

Access the Review Inventory Post Errors - Search page.

Select the search criteria for the inventory post errors that you want to view. Select Plan Unit Group or Unit, Request Type, Order Type, and Error Type. To narrow the error selection, you can select any of the other search fields: Planner Cd (planner code), Item ID, Schedule Date(scheduled shipped date), and Schedule Arrive (scheduled arrival date).

Error Type

Cancel/Delete/Closed Select this check box to view cancellation, deletion, and closure errors that occurred in PeopleSoft Inventory and are associated with the search criteria that you selected.

Order Changed Select this check box to view order change errors associated with the search criteria that you selected. The order in PeopleSoft Inventory changes after being loaded into PeopleSoft Supply Planning.

Tolerance Select this check box to view tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of orders that are within tolerance. One of the options is to post an error if the reschedule update is invalid.

See Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3.

Quantity Changed Select this check box to view quantity change errors associated with the search criteria that you selected.

Quantity change errors occur if the order quantity on existing inventory transactions in the PeopleSoft Inventory system do not match the order quantity on the update message from PeopleSoft Supply Planning.

Previously Converted Select this check box to view previously converted errors that are associated with the search criteria that you selected.

These type of errors occur if, for example, a planned interunit transfer is created but not applied before the interunit transfer is brought back into PeopleSoft Supply Planning. The next time that you run the Post Updates process the interunit transfer order may have already been converted into an actual interunit transfer order from the last run. This could produce a doubling of the interunit transfer order in your system.

Reviewing PeopleSoft Inventory Post Error Details

Access the Review Inventory Post Errors - Details page

When this page initially appears all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details, Description, Order, Dates, and Configuration Code—within the page.

Message Text The system displays error message text associated with each error message. Messages are:

- *Cannot be Applied Due to Cancel, Delete, Close, Ship, or Hold.*
- *Cannot be Applied Due to Order Change.*
- *Order was Rescheduled Within Tolerance.*
- *Planned Order was Previously Converted.*

Approving PeopleSoft Inventory Updates

This section discusses how to:

- Select PeopleSoft Inventory updates for review.
- Review and approve PeopleSoft Inventory updates.

Pages Used to Approve PeopleSoft Inventory Updates

Page Name	Object Name	Navigation	Usage
Approve Inventory Updates - Search	DEM_CHG_SRC_SPL	Supply Planning, Commit Plan, Inventory, Approve Inventory Updates, Search	Define the search criteria for the PeopleSoft Inventory updates that you want to review.
Approve Inventory Updates - Summary	DEM_CHG_SUM_SPL	Supply Planning, Commit Plan, Inventory, Approve Inventory Updates, Summary	Review and approve PeopleSoft Inventory updates that you want to apply to PeopleSoft Inventory.
Message Detail	DEM_CHG_MSD_SPL	Click the Details button next to an update on the Approve Inventory Updates - Summary page.	View the message details for a particular PeopleSoft Inventory update.

Selecting PeopleSoft Inventory Updates for Review

Access the Approve Inventory Updates - Search page.

Select the search criteria for the PeopleSoft Inventory updates that you want to review. You must select a Plan Unit Group or Unit; or a Destination Unit Group or Destination Unit; Order Type, Message Type, and Status. To narrow the update selection, you can select any of the other search fields: Source Planner or Destination Planner; Item ID, Schedule Date(scheduled shipped date), Schedule Arrive (scheduled arrival date), and Priority.

Message Type

Planned Select this check box to view updates directing PeopleSoft Inventory to create planned interunit transfers. The system selects this check box by default when the page initially appears.

Reschedule Select this check box to view updates recommending rescheduling of inventory orders.

Reprioritize Select this check box to view updates reprioritized in PeopleSoft Supply Planning.

Canceled Select this check box to view updates suggesting cancellations to inventory orders.

Status

Select the status for the updates that you want to review. You must select either Approved or Unapproved. You must also select one of these statuses: Expedite, Accepted, or Cutoff.

Unapproved Select this check box to view updates that were not approved in previous review sessions. The system selects this check box by default when the page initially appears.

Approved Select this check box to view updates that were previously approved but not processed.

Processed

Select this check box to view updates that were previously approved and processed. In this case, these updates and the inventory data have been updated with recommended changes from PeopleSoft Supply Planning .

Tolerance

Select this check box to view reschedules that are within tolerance. If you select this option, the system displays any updates that fall within the schedule in and out tolerances defined for the items selected. The Reschedule In Factor field sets the tolerance for updates to move an order to an earlier date.

The Reschedule Out Factor field sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process. These orders within tolerance can be automatically approved, marked as a valid change pending approval, considered an exception, or ignored all together.

Order updates that fall outside of the tolerance range always appear on the Approve Inventory Updates - Summary page. Selecting the Tolerance check box enables you to view orders on that page that fall within tolerance.

Expedite

Select this check box to review updates that are required before the planning time fence.

Accepted

Select this check box to review updates that are between the planning time fence and the action message cutoff fence.

Cutoff

Select this check box to review updates for items that have updates beyond the action message cutoff fence defined for the item.

Planned Order Violations

Violations

Select an option for processing planned transfer orders. Values are:

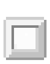
- *Exclude Violated:* Excludes planned transfers with violations.
- *Only Violated:* Includes only planned transfers with violations.
- *Both:* All planned transfers.

Reviewing and Approving the PeopleSoft Inventory Updates

Access the Approve Inventory Updates - Summary page.

When this page initially appears all of the updates that meet the selection criteria appear on the page. You can view more information pertaining to the update by selecting the different tabs—Message Detail, Status, Item Information, Order, and Shipping Details—within the page.

Click the Approve All button or link to approve all of the updates that appear.



Click the Reset Approval button or link to clear all of the updates that are already approved.

Approved

Select this check box next to an individual update to approve that update.

Details Click this button next to an update to view all of the details for that particular update. When you click this button the Message Detail page appears.

Applying PeopleSoft Inventory Updates

This section discusses how to apply PeopleSoft Inventory updates.

Page Used to Apply PeopleSoft Inventory Updates

Page Name	Object Name	Navigation	Usage
Apply Inventory Updates - Apply Planning Messages	DEM_CHG_REQ_INV	Supply Planning, Commit Solution, Inventory, Apply Inventory Updates, Apply Planning Messages	Initiate the IN Apply Planning Messages COBOL process that processes the PeopleSoft Inventory updates that you have approved. This process applies the updates so that PeopleSoft Inventory can act on the suggestions made by PeopleSoft Supply Planning.

Applying PeopleSoft Inventory Updates

Access the Apply Inventory Updates - Apply Planning Messages page.

Planner Code

Select *All* or *Single* for the source and destination planner codes. If you select *Single,* enter the planner code in the field provided; only those items belonging to that planner are processed.

Item Selection

Select *All* or *Single* for the item. If you select *Single,* enter the item number in the field provided.

Reviewing Applied PeopleSoft Inventory Errors

This section discusses how to review applied PeopleSoft Inventory updates and errors.

Pages Used to Review Applied PeopleSoft Inventory Errors

Page Name	Object Name	Navigation	Usage
Review Apply Inventory Errors - Review Planning Exceptions	DEM_CHG_EXC_INV	Supply Planning, Commit Plan, Inventory, Review Apply Inventory Errors, Review Planning Exceptions	Review the PeopleSoft Inventory updates that have been applied to the system through the IN Apply Planning Messages COBOL process. This page displays the errors that occurred for a particular update and also displays the updates that were processed successfully.
Exception Detail	DEM_CHG_EXD_INV	Click the Details link next to an update on the Review Apply Inventory Errors - Review Planning Exceptions page.	View the order details of a specific PeopleSoft Inventory error or processed update.

Reviewing Applied PeopleSoft Inventory Updates and Errors

Access the Review Apply Inventory Errors - Review Planning Exceptions page.

When this page initially appears, all of the updates and errors that were processed by the IN Apply Planning Messages process appear. You can view more information pertaining to the error or update by selecting the different tabs—Planning Exceptions and Exception Details—within the page.

Planning Exceptions Tab

Type

The system displays the type of message for each update or error. Values are:

- *Cancel*
- *New*
- *Priority*
- *Reschedule*

Status

The system displays the status of the message or error. Values are:

- *ICT Inval:* Intercompany setup invalid.
- *Item Appr:* Item not approved.
- *Item Def:* Business unit item not defined.
- *IU Own:* No interunit ownership.
- *Not Found:* Demand line not found.
- *Printed:* Picklist printed.
- *Processed:* Processed.
- *SetIDs:* SetIDs different.
- *Shipping:* In shipping.

Demand Source

The system displays the source of demand for the order. Values are:

- *IN:* PeopleSoft Inventory.
- *PL:* PeopleSoft Supply Planning.
- *PR:* PeopleSoft Purchasing requisition.

Details

Click the Details link next to an update or error to view the order details for the error or update. When you click this link, the Exception Detail page appears.

CHAPTER 4

Committing PeopleSoft Production Control Updates

This chapter provides an overview of committing PeopleSoft production control updates and discusses how to:

- Review production control post errors.
- Approve production control updates.
- Apply production control updates.

Note. In the documentation, the term PeopleSoft Supply Planning refers to both PeopleSoft Supply Planning Multi-Site Material and Advanced Multi-Site Planner, unless stated otherwise.

Understanding PeopleSoft Production Control Updates Business Process

To meet item demands and target inventory levels, PeopleSoft Supply Planning creates planned production and recommends changes to existing production for PeopleSoft Production Management for execution. Within PeopleSoft Production Management, planned production can be automatically converted into production IDs and production schedules. In addition, you can canceled or reschedule existing production at the production and operations levels. You can also make component substitutions.

After you generate a supply plan, you can transfer new and existing production information from PeopleSoft Supply Planning to Production Management. PeopleSoft Supply Planning enables you to transfer production plan information back and forth between PeopleSoft Supply Planning and Production Management.

You can manage the production control updates from PeopleSoft Supply Planning after you run the Post Updates process (PL_POST).

To process production control updates:

1. Review the errors that occur from the Post Updates process using the Review Production Post Errors component.

   When you run the Post Updates process, PeopleSoft Supply Planning generates error messages. These error messages are generated, because a change in the production data occurred since the last time that you ran the Post Updates process, or a violation of a business rule occurred, such as an invalid calendar date.

2. (Optional) Review and approve the recommended production control updates using the Approve Production Updates component.

   Use this component to manually approve the updates that you want to apply to PeopleSoft Production Management. You can automatically approve all of the changes during the Post Updates process.

3. Apply the approved production control updates by initiating the Apply Planning Messages COBOL process (SFPAPLNS) using the Apply Production Updates component.

   This process generates an error log. Use this error log to view errors that occurred while applying the production control updates to PeopleSoft Production Management.

Use PeopleSoft Production Management to manage these updates from PeopleSoft Supply Planning:

- Creation of production IDs or schedules.
- Cancellation and reschedule of existing production IDs or schedules.
- Reschedule of operations for existing production IDs.
- Frozen production IDs or schedules.
- Component substitution for a production ID.

Prerequisites

Before you begin to review and apply production control updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook

Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3

Common Elements Used in This Chapter

Production ID

The system displays the production ID or production schedule associated with the update or the error. If the message or update is pertaining to a new order for a production schedule then *Schedule* will appear in this field.

Click the Item Search button located next to the Item ID field to access a transfer page of item-related links. On the transfer page, click the Item Search link to search for items using the Item Search Criteria page.

Note. Link options on transfer pages vary depending on the component and the item with which you are working.

Note. Only items with a status of *Active* or *Discontinue* are valid.

Reviewing Production Control Post Errors

This section discusses how to:

- Search for production control post errors.
- Review production control post errors.

Pages Used to Review Production Control Post Errors

Page Name	Object Name	Navigation	Usage
Review Production Post Errors - Search	PL_PROD_EXCPT_SRCH	Supply Planning, Commit Plan, Production Control, Review Production Post Errors, Search	Define the search criteria for the production control post errors that you want to review.
Review Production Post Errors - Review Planning Exceptions	PL_PROD_EXCEPT_SPL	Supply Planning, Commit Plan, Production Control, Review Production Post Errors, Review Planning Exceptions	View the production control errors that occurred from the Post Updates process.

Searching for Production Control Post Errors

Access the Review Production Post Errors - Search page.

Select the search criteria for the production post errors that you want to view. Select a unit or plan unit group; order type, and at least one error type.

Error Type

Cancel/Delete/Closed Select this check box to view cancellation, deletion, and closure errors that occurred in PeopleSoft Production Management and are associated with the search criteria that you selected.

Calendar Violation Select this check box to view errors pertaining to calendar violations—order dates that are not valid for the manufacturing calendar or a five day work week—associated with the search criteria that you selected.

No Production Area Select this check box to view errors pertaining to no production area—the item on the order does not have a valid production area—associated with the search criteria that you selected.

Order Changed Select this check box to view order change errors associated with the search criteria that you selected. The order in PeopleSoft Production Management changes after being loaded into PeopleSoft Supply Planning.

Pick Plan Generated Select this check box to view pick plan errors associated with the search criteria that you selected. The pick plan has already been generated for the order; therefore, you cannot apply changes.

Tolerance Select this check box to view tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of orders that are within tolerance. One option is to post an error if the reschedule update is invalid.

See Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3.

Illegal Substitution Select this check box to view illegal substitution errors associated with the search criteria that you selected. The component substitute does not appear on the bill of materials as a valid substitute.

No Routing Select this check box to view no routing errors associated with the search criteria that you selected. The production operation does not exist on the routing for the item on the order.

Previously Converted Select this check box to view previously converted errors that are associated with the search criteria that you selected.

These type of errors occur if, for example, a planned production order is created but not applied before it is brought back into PeopleSoft Supply Planning. The next time that you run the Post Updates process, the planned production order may have already been converted into an actual production order from the last run. This may cause a doubling of the orders in your system.

Reviewing Production Control Post Errors

Access the Review Production Post Errors - Review Planning Exceptions page.

When this page initially appears, it includes all of the post errors that meet the selection criteria. You can view more information pertaining to the error by selecting the different tabs—Exception Details, Quantity, Dates, Configuration Code, and Substitution.

Message Text Displays error message text associated with each post error. Messages are:

- *A Pick Plan Has Been Generated for This Order - Must Resolve Pick Plan.*
- *Cannot be Applied Due to Cancel, Delete, or Close.*
- *Cannot be Applied Due to Order Change.*
- *Invalid Calendar Date/Time for Production Header.*
- *Invalid Calendar Date/Time for Production Operation.*
- *Invalid Component Substitution at Operation.*
- *Order was Rescheduled Within Tolerance.*
- *Planned Order was Previously Converted.*
- *Production Area Does Not Exist for Business Unit/Item/BOM/Routing.*
- *Production Operation Does Not Exist On Routing.*

Approving Production Control Updates

This section discusses how to:

- Select production control updates for review.
- Review and approve the production control updates.

Pages Used to Approve Production Control Updates

Page Name	Object Name	Navigation	Usage
Approve Production Updates - Message Search	PL_PROD_SRCH_SPL	Supply Planning, Commit Plan, Production Control, Approve Production Updates, Message Search	Define the search criteria for the production control updates that you want to review.
Approve Production Updates - Message Summary	PL_PR_MSG_SUM_SPL	Supply Planning, Commit Plan, Production Control, Approve Production Updates, Message Summary	Review and approve the production control updates that you want to apply to PeopleSoft Production Management.
Approve Production Updates - Production Detail	PL_PR_HDR_DTL_SPL	Supply Planning, Commit Plan, Production Control, Approve Production Updates, Production Detail	View production and operation details for each production control update.
Approve Production Updates - Substitution	PL_PR_SUB_SPL	Supply Planning, Commit Plan, Production Control, Approve Production Updates, Substitution.	View the substitutes for a production control update.

Selecting Production Control Updates for Review

Access the Approve Production Updates - Message Search page.

Select the search criteria for the production updates that you want to review and approve. Select a plan unit group or unit. Select at least one message selection, production class, and status. To narrow the update selection, you can select any of the other search fields: Planner Code, Item ID, Order Status, and Production Start Dates.

Message Selection

Planned Orders Select this check box to view updates pertaining to planned orders.

Reschedule Select this check box to view updates pertaining to rescheduled orders.

Canceled Select this check box to view updates pertaining to canceled orders.

Substitution Select this check box to view updates pertaining to orders with substitutes.

Status

Select a status for the updates that you want to review. Select either Approved or Unapproved. Also select one of these statuses: Expedite, Accepted, or Cutoff.

Unapproved Select this check box to view updates that were not approved in previous review sessions. The system selects this check box by default.

Approved Select this check box to view updates that were previously approved but not processed.

Processed Select this check box to view updates that were previously approved and processed. These updates and the production data have been updated with the recommended changes from PeopleSoft Supply Planning.

Tolerance Select this check box to view reschedules that are within tolerance. If you select this check box, the system displays any updates that fall within the schedule in and out tolerances defined for the items selected. The Reschedule In Factor sets the tolerance for updates to move an order to an earlier date.

The Reschedule Out Factor sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process. These orders within tolerance can be automatically approved, marked as a valid change pending approval, considered an exception, or ignored all together.

For example, suppose that you set both factors to 5 and the production date is 12/10, PeopleSoft Supply Planning considers any order reschedule between the reschedule in date of 12/5 and reschedule out date of 12/15 as being within tolerance.

Order updates that fall outside of the tolerance range always appear on the Approve Production Updates - Message Summary page. You can select the Tolerance check box to view orders on the Approve Production Updates - Message Summary page that fall within tolerance.

Expedite Select this check box to review updates that are required before the planning time fence.

Accepted Select this check box to review updates that are between the planning time fence and the action message cutoff fence.

Cutoff Select this check box to review updates beyond the action message cutoff fence.

Planned Order Violations

Violations Select an option for processing planned production orders. Values are:

- *Exclude Violated:* Excludes planned production with violations.
- *Only Violated:* Includes only planned production with violations.
- *Both:* All planned production.

See Also

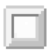
PeopleSoft Manufacturing 8.8 PeopleBook, “Maintaining Production Orders and Production Schedules,” Understanding Production IDs and Production Schedules

Reviewing and Approving the Production Control Updates

Access the Approve Production Updates - Message Summary page.

When this page initially appears, it includes all of the updates that meet the selection criteria. You can view more information pertaining to the update by selecting the different tabs—Production Details, Details, Flags, and Configuration Code—within the page.

Click the Approve All button or link to approve all of the updates.



Click this Reset Approval button or link to clear all of the updates that have been approved.

Approved

Select this check box—next to an individual update—to approve that update.

Production Status

Select the production status and then click the Set Status button to reset theStatus field for all of the unprocessed planned production updates that appear on this page. Values are:

- *Entered.*
- *Firmed.*
- *Released.*

Reset Processed

Click this button to change any update which currently has a processed status of *Error* or *In Process* to a status of *Not Processed.*

If the Apply Planning Message COBOL process fails, you can use this functionality to resubmit those updates for reprocessing.

See Also

PeopleSoft Manufacturing 8.8 PeopleBook, “Managing Your Production”

Applying Production Control Updates

This section discusses how to apply production control updates.

Page Used to Apply Production Control Updates

Page Name	Object Name	Navigation	Usage
Apply Production Updates - Apply Planning Messages	SF_PRDN_PLN_REQ	Supply Planning, Commit Plan, Production Control, Apply Production Updates	Initiate the Apply Planning Messages COBOL process to process the production control updates that you have approved. This process applies the updates so that PeopleSoft Production Management can act on the suggestions made by PeopleSoft Supply Planning.

Applying Production Control Updates

Access the Apply Production Updates - Apply Planning Messages page.

Production Selection

Process Production IDs Select this check box to apply messages for production IDs.

Process Production Schedules Select this check box to apply messages for production schedules.

Production Message Options

Convert Planned Production Select this check box to convert planned production into production IDs and production schedules.

Apply Production Changes Select this check box to apply production change messages to existing production IDs and production schedules.

CHAPTER 5

Committing PeopleSoft Purchasing Updates

This chapter provides an overview of committing PeopleSoft Purchasing updates and discuss how to:

- Review PeopleSoft Purchasing post errors.
- Approve PeopleSoft Purchasing updates.
- Apply PeopleSoft Purchasing updates recommending new purchase orders (POs).
- Apply PeopleSoft Purchasing updates recommending changes to POs.

Note. In the documentation, the term PeopleSoft Supply Planning refers to both PeopleSoft Supply Planning Multi-Site Material and Advanced Multi-Site Planner, unless stated otherwise.

Understanding PeopleSoft Purchasing Updates Business Process

When you run the Post Updates process (PL_POST), it generates purchasing recommendations, updates, and post errors. You can review, analyze, approve, and apply those purchasing updates to PeopleSoft Purchasing.

PeopleSoft Production Management, PeopleSoft Collaborative Supply Management (collaborative planning schedules) and PeopleSoft Supply Planning write their requested POs to a staging area that is scanned by the PO Stage Load (purchase order stage load) process (PO_POSTAGE). This process writes the inputs to a temporary staging area, PO Staging tables, in preparation for sourcing to a PO.

The collaborative planning schedules in PeopleSoft Collaborative Supply Management enable a scheduler, buyer, or supplier to modify an existing planned PO, create a new planned order, and approve it simultaneously using the scheduler and supplier workbenches. These planned orders are brought back to PeopleSoft Supply Planning through the Planning Instance Load process (PL_LOAD_OPT). In net change mode, the Planning Instance Load process selects all of the new or modified planned orders. Any planned orders that have been canceled in the scheduler or supplier workbench are removed from the planning instance. When you run the Planning Instance Load process in regenerative mode, none of the canceled (deleted) planned orders in the workbenches are brought back into PeopleSoft Supply Planning.

After you approve the purchasing updates, either through the Approve Purchasing Updates component or through the workbenches in PeopleSoft Collaborative Supply Management (collaborative planning schedules), you can apply them in PeopleSoft Purchasing by loading them into PO staging tables. If new POs must be created, build them using the purchase order build process. You can make changes on approved change order requests using the change order process.

You can manage the PeopleSoft Purchasing updates from PeopleSoft Supply Planning after you run the Post Updates process.

To process PeopleSoft Purchasing updates:

1. Review the errors that occurred from the Post Updates process using the Review Purchasing Post Errors component.

   When you run the Post Updates process and the system finds errors, the system generates error messages, because a change in the purchasing data occurred since you ran the Post Updates process, or because a violation of a business rule occurred, such as an invalid calendar date.

2. (Optional) Review and approve the recommended PeopleSoft Purchasing updates using the Approve Purchasing Updates component.

   When PeopleSoft Supply Planning suggests an adjustment to an existing PO, or suggests that you create a PO, an update is placed on the Approve Purchasing Update component. This occurs after run the Post Updates process.

   Use this component to approve the PeopleSoft Purchasing updates manually. You can automatically approve all of the changes during the Post Updates process.

3. Apply the approved PO updates to PeopleSoft Purchasing.

   a. Initiate the PO Stage Load process using the Request PO Stage Load component.

      This process searches for PO requests. PO requests are loaded into the PO stage tables.

   b. (Optional) Review the results of the PO stage tables using the Sourcing Workbench component.

      You should review the contents of the staging tables before and after each step in the sourcing process.

   c. Initiate the PO Calculations process (PO_POCALC) using the Calculate Purchase Orders component.

   d. (Optional) Review the results of the PO stage tables using the Sourcing Workbench component.

   e. Initiate the Create Purchase Orders process (PO_POCREATE) using the Create Purchase Orders component.

      Note. You can use the PO Auto Sourcing component to initiate the PO Stage Load, PO Calculations, and Create Purchase Orders processes in sequence on the same set of records, instead of initiating the processes individually.

   f. (Optional) Review the results of the PO stage tables using the Sourcing Workbench component.

4. Apply the approved PO updates to PeopleSoft Purchasing.

   a. Initiate the PO Stage Load process using the Request PO Stage Load component.

      This process searches for PO change requests. PO change requests are loaded into the change request stage tables.

   b. Review and approve the PO change requests using the Review Change Requests component.

   c. Initiate the Change Purchase Order process (PO_POCHNG) using the Change Purchase Orders component.

Using PeopleSoft Purchasing, you can manage these types of updates from PeopleSoft Supply Planning:

- Creation of POs.
- Cancellation and reschedule of POs.
- Frozen POs.

See Also

Chapter 5, “Committing PeopleSoft Purchasing Updates,” Applying PeopleSoft Purchasing Updates Recommending New POs, page 45

Chapter 5, “Committing PeopleSoft Purchasing Updates,” Applying PeopleSoft Purchasing Updates Recommending Changes to POs, page 47

Prerequisites

Before you begin to review and apply purchase updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook

Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3

Reviewing PeopleSoft Purchasing Post Errors

This section discusses how to:

- Search for PeopleSoft Purchasing post errors.
- Review PeopleSoft Purchasing post error details.

Pages Used to Review PeopleSoft Purchasing Post Errors

Page Name	Object Name	Navigation	Usage
Review Purchasing Post Errors - Search	SPL_PO_EXCPT_SRCH	Supply Planning, Commit Plan, Purchasing, Review Purchasing Post Errors, Search	Define the search criteria for the PeopleSoft Purchasing post errors that you want to review.
Review Purchasing Post Errors - Errors	SPL_PO_EXCEPTION	Supply Planning, Commit Plan, Purchasing, Review Purchasing Post Errors, Errors	View the details of a PeopleSoft Purchasing post error that occurred during the Post Updates process.

Searching for PeopleSoft Purchasing Post Errors

Access the Review Purchasing Post Errors - Search page.

Select the search criteria for the PeopleSoft Purchasing post errors that you want to view. Select a plan unit group or business unit; and an error type. To narrow the error selection, you can select an item ID and a planner code.

Error Type

Cancel/Delete/Closed Select this check box to view cancellation, deletion, and closure errors that occurred in PeopleSoft Purchasing and are associated with the search criteria that you selected.

Order Changed Select this check box to view PO change errors associated with the search criteria that you selected. The order in PeopleSoft Purchasing changes after being loaded into PeopleSoft Supply Planning.

Tolerance Select this check box to view within tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process, you can decide how the system should handle the updates pertaining to the reschedule of POs that are within tolerance. You can post an error if the reschedule update is invalid.

See Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3.

Quantity Changed Select this check box to view quantity change errors associated with the search criteria that you selected.

Previously Converted Select this check box to view previously converted errors that are associated with the search criteria that you selected.

Reviewing PeopleSoft Purchasing Post Error Details

When this page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details, PO Details, and Configuration Code—within the page.

Message Text The system displays error message text associated with each post error message. Messages are:

- *Cannot be Applied Due to Cancel, Delete, Close, Ship, or Hold.*
- *Cannot be Applied Due to Order Change.*
- *Order was Rescheduled Within Tolerance.*
- *Quantity Changed in Planning Engine.*

Approving PeopleSoft Purchasing Updates

This section discusses how to:

- Select PeopleSoft Purchasing updates for review.
- Review and approve the PeopleSoft Purchasing updates.

Pages Used to Approve PeopleSoft Purchasing Updates

Page Name	Object Name	Navigation	Usage
Approve Purchasing Updates - Search	SPL_PO_MSG_SRCH	Supply Planning, Commit Plan, Purchasing, Approve Purchasing Updates, Search	Define the search criteria for the PeopleSoft Purchasing updates that you want to review.
Approve Purchasing Updates - Summary	SPL_PO_MSG_SUM	Supply Planning, Commit Plan, Purchasing, Approve Purchasing Updates, Summary	Review and approve the PeopleSoft Purchasing updates that you want to apply to PeopleSoft Purchasing.

Selecting PeopleSoft Purchasing Updates for Review

Access the Approve Purchasing Updates - Search page.

Enter an inventory unit (PeopleSoft Inventory business unit) or plan unit group. Select at least one message selection and status.

Message Type

Planned Order Select this check box to view updates pertaining to new POs.

Existing Order Select this check box to view updates pertaining to existing POs.

Message Type

Reschedule Select this check box to view rescheduled updates associated with existing POs.

Canceled Select this check box to view canceled updates associated with POs.

Supplier Scheduled Items

Select orders for items using Collaborative Supply Management. Select one of the these statuses Include Schedule Items, Exclude Schedule Items, or Show Only Schedule Items.

Include Schedule Items Select this check box to show orders for items regardless of whether the item uses PeopleSoft Collaborative Supply Management or not.

Exclude Schedule Items Select this check box to only show orders for items not using PeopleSoft Collaborative Supply Management.

Show Only Schedule Items Select this check box to only show orders for items using PeopleSoft Collaborative Supply Management.

Strategic Sourcing Events

Select orders for spot buy items which will be sourced via PeopleSoft Strategic Sourcing instead of PeopleSoft Purchasing. Select one of the these statuses Include Planned Events, Exclude Planned Events, or Show Only Planned Events.

Include Planned Events Select this check box to show orders sourced through PeopleSoft Purchasing and PeopleSoft Strategic Sourcing.

Exclude Planned Events Select this check box to show orders which will be sourced through PeopleSoft Purchasing only.

Show Only Planned Events Select this check box to show orders which will be sourced through PeopleSoft Strategic Sourcing.

Status

Select a status for the updates that you want to review. Select eitherApprovedor Unapproved. Also select one of the these statuses Expedite, Accepted, or Cutoff.

Unapproved Select this check box to view updates that were not approved in previous review sessions. The system selects this check box by default.

Approved Select this check box to view updates that were previously approved but not processed.

Staged Select this check box to view planned orders which have been through the PO Stage process but not the PO Build process.

Processed Select this check box to view planned purchase orders have been through the PO Build process or existing purchase order changes which have been through the PO Staging process.

Tolerance Select this check box to view reschedules within tolerance. If you select this check box, the system displays any updates that fall within the schedule in and out tolerances defined for the items that you selected. The Reschedule In Factor field sets the tolerance for updates to move an order to an earlier date.

The Reschedule Out Factor field sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process. There orders within tolerance can be automatically approved, marked as a valid change pending approval, considered an exception, or ignored all together.

For example, suppose that you set both factors to 5 and the production date is 12/10, PeopleSoft Supply Planning considers any order reschedule between the reschedule in date of 12/5 and reschedule out date of 12/15 as being within tolerance. This applies if the change is a reschedule only.

Expedite Select this check box to review updates that are required before the planning time fence.

Accepted Select this check box to review updates that are between the planning time fence and the action message cutoff fence.

Cutoff Select this check box to review updates for items that have updates beyond the action message cutoff fence defined for the item.

Reviewing and Approving PeopleSoft Purchasing Updates

Access the Approve Purchasing Updates - Summary page.

When this page initially appears, it includes all of the updates that meet the selection criteria. You can view more information pertaining to the update by selecting the different tabs—PO Details, Dates/Times, Quantity/Vendor, Status, Buyer, and Configuration Code—within the page.

Click the Approve All button or link to approve all of the updates that appear.

Click the Reset Approval button or link to clear all of the updates that are already approved.

Approved

Select this check box next to an individual update to approve the update.

Applying PeopleSoft Purchasing Updates Recommending New POs

This section discusses how to run the PO Stage Load process.

Pages Used to Apply PeopleSoft Purchasing Updates Recommending New POs

Page Name	Object Name	Navigation	Usage
Request PO Stage Load - PO Stage Load	RUN_PO_POSTAGE	Supply Planning, Commit Plan, Purchasing, Request PO Stage Load, PO Stage Load	Initiate the PO Stage Load process.
Calculate Purchase Orders - Run Controls	RUN_PO_POCALC1	Supply Planning, Commit Plan, Purchasing, Calculate Purchase Orders, Run Controls	Enter process parameters to run the PO Calculations process and initiate the PO Calculations process. See *PeopleSoft Purchasing 8.8 PeopleBook,* “Using Purchase Order Sourcing,” Running the PO Calculations Application Engine Process.
Calculate Purchase Orders - Select Criteria	RUN_PO_POCALC2	Supply Planning, Commit Plan, Purchasing, Calculate Purchase Orders, Select Criteria	Enter the selection criteria for the PO Calculations process. See *PeopleSoft Purchasing 8.8 PeopleBook*, “Using Purchase Order Sourcing,” Running the PO Calculations Application Engine Process.

Page Name	Object Name	Navigation	Usage
Create Purchase Orders - Create PO	RUN_PO_POCREATE	Supply Planning, Commit Plan, Purchasing, Create Purchase Orders, Create PO	Enter selection criteria and initiate the Create Purchase Orders process. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Using Purchase Order Sourcing," Creating POs Using the Create Purchase Orders Application Engine Process.
Sourcing Workbench - Selection Criteria	PO_SRC_CRITERIA	Supply Planning, Commit Plan, Purchasing, Sourcing Workbench, Selection Criteria	Select which stage rows to view on the Sourcing Workbench - Selected Items page. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Using Purchase Order Sourcing," Using the Sourcing Workbench.
Sourcing Workbench - Selected Items	PO_SRC_ANALYSIS	Supply Planning, Commit Plan, Purchasing, Sourcing Workbench, Selected Items	View the rows of data on the PO_ITM_STG table and access pages to change the recommended vendor, quantities sourced to each vendor, or correct errors. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Using Purchase Order Sourcing," Using the Sourcing Workbench.
PO Auto Sourcing - Process Sel	RUN_PO_AUTOSRC	Supply Planning, Commit Plan, Purchasing, PO Auto Sourcing, Process Sel	(Optional) Run multiple PeopleSoft Purchasing sourcing processes in sequence on the same set of records. **Note.** Use this process to run the PO Stage Load, PO Calculations, and Create Purchase Order processes in sequential order all at one time versus initiating these processes individually. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Using Purchase Order Sourcing," Running the Automatic Purchasing Sourcing Process.

Running the PO Stage Load Process

Access the Request PO Stage Load - PO Stage Load page.

Process Planning Requests	Select this check box to process purchase requests from PeopleSoft Supply Planning. If this check box is clear, the system ignores purchase requests from these sources.
Group POs by Item - Planning (group purchase orders by item - planning)	Select this check box to consolidate the POs into one PO per vendor, per item. This can be desirable if the POs are very large. If this check box is clear, you can generate POs with multiple lines for the same vendor. This check box is used in conjunction with the Process Planning Requests check box.
Purchase Order Type	Select to indicate the type of requests that you want to load. If you do not select a value, both types are loaded. To use this option, you must select Process Planning Requests. Values are: • *E* (existing orders): Changes to an existing PO. • *N* (planned order): Generate new planned orders.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, "Using Purchase Order Sourcing," Loading Staged Purchase Order Requests from PeopleSoft Supply Planning and Production Management

Applying PeopleSoft Purchasing Updates Recommending Changes to POs

This section discusses how to change POs.

Pages Used to Apply PeopleSoft Purchasing Updates Recommending Changes to POs

Page Name	Object Name	Navigation	Usage
Request PO Stage Load - PO Stage Load	RUN_PO_POSTAGE	Supply Planning, Commit Plan, Purchasing, Request PO Stage Load, PO Stage Load	Initiate the PO Stage Load process. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Using Purchase Order Sourcing," Loading Staged Purchase Order Requests from PeopleSoft Supply Planning and Production Management.
Review Change Requests - Selection Criteria	CHNG_RQST_SELECT	Supply Planning, Commit Plan, Purchasing, Review Change Requests, Selection Criteria	Enter the selection criteria for the change orders that you want to view on the Change Ord Rqsts page. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Order Change Orders," Reviewing and Approving Change Order Requests.
Review Change Requests - Change Ord Rqsts	CHNG_ORD_LOOKUP	Supply Planning, Commit Plan, Purchasing, Review Change Requests, Change Ord Rqsts	Review and approve change requests. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Order Change Orders," Reviewing and Approving Change Order Requests.
Change Purchase Orders - PO Changes	RUN_PO_POCHNG	Supply Planning, Commit Plan, Purchasing, Change Purchase Orders, PO Changes	Initiate the Change Purchase Order process.

Changing POs

Access the Change Purchase Orders - PO Changes page.

All Source Select this check box to run the process for all of the sources. Clear this check box to select a value in the Source field.

Source Select a particular source for the PO changes. The source to use for PO changes initiated from PeopleSoft Supply Planning is: *PLN:* (planning system).

See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Order Change Orders".

CHAPTER 6

Committing PeopleSoft Order Management Updates

This chapter provides an overview of committing PeopleSoft Order Management updates and discusses how to:

- Review PeopleSoft Order Management post errors.
- Review PeopleSoft Order Management updates.

Note. The term PeopleSoft Supply Planning refers to both PeopleSoft Supply Planning Multi-Site Material and Advanced Multi-Site Planner, unless stated otherwise.

Understanding PeopleSoft Order Management Updates Business Process

When you run the Post Updates process (PL_POST), it generates order management recommendations and post errors. You can review and manually apply those order management updates to PeopleSoft Order Management.

You can manage the PeopleSoft Order Management updates from PeopleSoft Supply Planning after you run the Post Updates process.

To process PeopleSoft Order Management updates:

1. Review the errors that occurred from the Post Updates process using the Review Post Errors component.

   When you run the Post Updates process, the system generates error messages. The Post Updates process generates exception messages when a change in the planning instance occurs that cannot be directly applied in PeopleSoft Order Management. Additionally, net change conditions (when, for example, a sales order is modified after being extracted into PeopleSoft Supply Planning) also appear as errors.

2. Review the recommended PeopleSoft Order Management updates using the Review Updates component.

   During the Post Updates process, the system compares the exported sales order from PeopleSoft Supply Planning with the actual sales orders in PeopleSoft Order Management. Based on material and capacity constraints, PeopleSoft Supply Planning suggests rescheduling ship dates for orders that cannot be shipped on the customer-requested ship date or the scheduled ship date. You can direct rescheduling of demand by establishing demand priorities, freezing orders within the planning instance, and varying solver reschedule options.

3. Apply the PeopleSoft Order Management updates manually in PeopleSoft Order Management.

   Use the inquiry pages in PeopleSoft Supply Planning to review rescheduled shipment dates along with manual changes that a planner may have made in a planning instance. The Review Updates pages are used for inquiry only; you must apply the suggested updates manually in PeopleSoft Order Management.

See *PeopleSoft Order Management 8.8 PeopleBook*.

Use PeopleSoft Order Management to manage these types of updates from PeopleSoft Supply Planning:

- Reschedule of sales orders or quotes.
- Modifications in quantities and status on sales orders or quotes made by the planner.
- Modifications to buying agreements.

Prerequisites

Before you begin to review and apply PeopleSoft Order Management updates, you must:

- Generate the supply plan.
- Run the Post Updates process.

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook

Chapter 2, “Posting PeopleSoft Supply Chain Planning Updates to the Transaction System ,” page 3

Reviewing PeopleSoft Order Management Post Errors

This section discusses how to:

- Search for PeopleSoft Order Management post errors.
- Review PeopleSoft Order Management sales order and quote error details.
- Review PeopleSoft Order Management buying agreement error details.

Common Element Used in This Section

Message Text The system displays error message text associated with each post error message. Messages are:

- *Cannot be Applied Due to Cancel, Delete, Close, Ship, or Hold.*
- *Cannot be Applied Due to Order Change.*
- *Order was Rescheduled Within Tolerance.*
- *Quantity Changed in Planning Engine.*
- *Order was Canceled by the Planning Engine.*

Pages Used to Review PeopleSoft Order Management Post Errors

Page Name	Object Name	Navigation	Usage
Review Post Errors - Search	PL_OM_EXCPT_SRCH	Supply Planning, Commit Plan, Order Management, Review Post Errors, Search	Define the search criteria for the PeopleSoft Order Management post errors that you want to review.
Review Post Errors - Sales Orders/Quotes	PL_SO_EXCEPTION	Supply Planning, Commit Plan, Order Management, Review Post Errors, Sales Orders/Quotes	Review the PeopleSoft Order Management post errors that pertain to sales orders or quotes that occurred during the Post Updates process.
Review Post Errors - Buying Agreements	PL_BA_EXCEPTION	Supply Planning, Commit Plan, Order Management, Review Post Errors, Buying Agreements	Review the PeopleSoft Order Management post errors that pertain to buying agreements that occurred during the Post Updates process.

Searching for PeopleSoft Order Management Post Errors

Access the Review Post Errors - Search page.

Select the search criteria for the PeopleSoft Order Management post errors that you want to view. Select a plan unit group or ship from business unit, order type, and at least one error type.

Error Type

Cancel/Delete/Closed

Select this check box to view cancellation, deletion, and closure errors that occurred in PeopleSoft Order Management and are associated with the search criteria that you selected.

Order Changed

Select this check box to view order change errors associated with the search criteria that you selected. The order in PeopleSoft Order Management changes in after being loaded in PeopleSoft Supply Planning.

Rescheduled w/in Tolerance (rescheduled within tolerance)

Select this check box to view within tolerance errors that are associated with the search criteria that you selected.

When you run the Post Updates process you can decide how the system should handle the updates pertaining to the reschedule of sales orders, quotes, and buying agreements that are within tolerance. One of the options is to post an error if the reschedule update is invalid.

Quantity Changed

Select this check box to view quantity change errors associated with the search criteria that you selected.

Quantity change errors occur if changes are made to the order quantity in the planning engine.

Planning Canceled Select this check box to view all of the orders which were manually canceled within PeopleSoft Supply Planning.

Reviewing PeopleSoft Order Management Sales Order and Quote Error Details

Access the Review Post Errors - Sales Orders/Quotes page.

When this page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details, Dates, and Configuration Code—on the page.

Reviewing PeopleSoft Order Management Buying Agreement Error Details

Access the Review Post Errors - Buying Agreements page.

When this page initially appears, all of the post errors that meet the selection criteria appear on the page. You can view more information pertaining to the error by selecting the different tabs—Exception Details and Dates—on the page.

Reviewing PeopleSoft Order Management Updates

This section discusses how to:

- Select PeopleSoft Order Management updates for review.
- Reviewing PeopleSoft Order Management sales order and quote updates.
- Reviewing PeopleSoft Order Management buying agreement updates.

Pages Used to Review PeopleSoft Order Management Updates

Page Name	Object Name	Navigation	Usage
Review Updates - Search	PL_OM_MSG_SRCH	Supply Planning, Commit Plan, Order Management, Review Updates, Search	Define the search criteria for the PeopleSoft Order Management updates that you want to review.
Review Updates - Sales Orders/Quotes	PL_SO_MESS_SUM	Supply Planning, Commit Plan, Order Management, Review Updates, Sales Orders/Quotes	View the PeopleSoft Order Management sales orders and quotes updates that you may want to apply to PeopleSoft Order Management.
Review Updates - Buying Agreements	PL_BA_OMMSG_SUM	Supply Planning, Commit Plan, Order Management, Review Updates, Buying Agreements	View the PeopleSoft Order Management buying agreement updates that you may want to apply to PeopleSoft Order Management.

Selecting PeopleSoft Order Management Updates for Review

Access the Review Updates - Search page.

Select the search criteria for the PeopleSoft Order Management updates that you want to review. Select a plan unit group or ship from business unit. You must also select at least one order type and status. To narrow the update selection, you can select any of the other search fields: Ship To, Product ID, and OM Unit (PeopleSoft Order Management business unit).

Status

Expedite Select this check box to review updates that are required before the planning time fence.

Accepted Select this check box to review updates that are between the planning time fence and the action message cutoff fence.

Cutoff Select this check box to review updates beyond the action message cutoff fence defined for the item.

Tolerance Select this check box to view reschedules that are within tolerance. If you select this check box, the system displays any updates that fall within the schedule in and out tolerances defined for the items that you selected. The Reschedule In Factor sets the tolerance for updates to move an order to an earlier date.

The Reschedule Out Factor sets the tolerance for updates to move an order to a later date. PeopleSoft Supply Planning uses these factors to determine how orders within tolerance are processed by the Post Updates process.

Order updates that fall outside of the tolerance range always appear on the Review Updates - Sales Orders/Quotes or Buying Agreements pages. If you select Tolerance, you can view orders that fall within tolerance on that page as well.

Reviewing PeopleSoft Order Management Sales Order and Quote Updates

Access the Review Updates - Sales Orders/Quotes page.

When this page initially appears, all of the sales orders and quotes updates that meet the selection criteria appear on the page. You can view more information pertaining to the updates by selecting the different tabs—Dates, Status, Quantity, Customer/Product ID, and Configuration Code—on the page.

Reviewing PeopleSoft Order Management Buying Agreement Updates

Access the Review Updates - Buying Agreements page.

When this page initially appears, all of the buying agreement updates that meet the selection criteria appear on the page. You can view more information pertaining to the updates by selecting the different tabs—Dates, Status, Quantity, and Customer/Product ID—on the page.

APPENDIX A

Appendix A: PeopleSoft Supply Planning Reports

This appendix provides an overview of PeopleSoft Supply Planning reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with the documentation.

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook

PeopleSoft Supply Planning Reports: Reports A to Z

This table lists the PeopleSoft Supply Planning reports, sorted alphanumerically by report ID. The reports listed are all Structured Query Reports (SQRs). If you need more information about a report, refer to the links at the end of this appendix.

Note. If you are running a PeopleSoft 8.8 Supply Planning with PeopleSoft 8.4 Supply Chain Management, the original Planning report (PLS2001), Inconsistency report (PLS3000), and Planning Messages report (PLS4001) appear in the Production Planning and Enterprise Planning menus. Do not generate these reports from the Production Planning and Enterprise Planning menus.

Report ID and Report Name	Description	Navigation	Run Control Page
PLS4002 Planning Useup	Review discontinued items, their useup dates, and their substitute items.	Supply Planning, Commit Plan, Planning, Planning Useup Report	PL_USEUP_RPT
PLS4011 Planning Updates	Review the new and changed orders generated by the Post Update process for PeopleSoft Purchasing, Production, Inventory, and Order Management.	Supply Planning, Commit Plan, Planning , Planning Updates Report	PL_MESS_RPT

See Also

PeopleSoft 8.8 SP1 Supply Planning Multisite Material Planner and PeopleSoft 8.8 SP1 Supply Planning Advanced Multisite Planner PeopleBook

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 *receivables specialist.* 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.

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).

business unit — A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

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 *sub-classification.*

clone — In PeopleCode, to make a unique copy. In contrast, to *copy* 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.

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.

control table — 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 profile — 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.

cost row — A cost transaction and amount for a set of ChartFields.

current learning — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition — 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).

data elements — 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.

dataset — 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.

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.

delivery method type
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.

directory information tree
In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing
A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

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 *Enterprise Incentive Management ledger.* 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.

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 *key performance indicator.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) 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 *1*—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 *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT 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.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference 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).

reference transaction
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.

regional sourcing
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.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
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.

role user
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.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
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.

run control ID
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 *basis* 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 *value-added tax exception.* 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 *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* 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 *zero-rated value-added tax.* 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.

Index

Q

R

S

T

U

V

W