PeopleSoft®

PeopleSoft eSupplier Connection 8.8 PeopleBook

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Open Source Disclosure

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.
- Pages with deferred processing.

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 *PeopleSoft eSupplier Connection PeopleBook* provides you with implementation and processing information for your PeopleSoft eSupplier Connection system. However, additional, essential information describing the setup and design of your 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.

The following companion PeopleBooks contain information that applies specifically to PeopleSoft eSupplier Connection.

- *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook*
- *PeopleSoft Setting Up Procurement Options 8.8 PeopleBook*
- *PeopleSoft Managing Items 8.8 PeopleBook*
- *PeopleSoft Purchasing 8.8 PeopleBook*

Pages With Deferred Processing

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

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Process Scheduler

Common Elements Used in This PeopleBook

Business Unit Enter 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.

Effective Date Enter the 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.

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 organization's structure and processing options.

Statistic Amount Converted cost using a standard unit of measure associated with a Statistic Code, for example, rental cost per square foot.

Wthd Hold Indicates whether the payment is withheld due to missing information for a withholding vendor.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Application Designer

CHAPTER 1

Getting Started with PeopleSoft eSupplier Connection

This chapter discusses PeopleSoft eSupplier Connection implementations and integrations.

PeopleSoft eSupplier Connection Overview

In today's business world, relationships between you and your suppliers are closer and more critical. Clear communication with suppliers about what you need and when you need it is a basic business requirement. PeopleSoft eSupplier Connection makes strategic information from back-end enterprise management systems available to suppliers, thus improving business collaboration, supplier response capability, and employee productivity. This internet-enabled collaboration allows buyers and sellers to work interactively, sharing the same view of data across the Internet. The benefits include faster and more accurate decisions, which result in improved customer service from suppliers, lower inventory in the supply chain, and total cost optimization.

Your suppliers can use PeopleSoft eSupplier Connection's self-service web applications to view and modify their own business information-company address, phone, and contact data-at their convenience. They can change or add office locations and change or add information about the individuals in their organization that handle your business relationship.

PeopleSoft eSupplier Connection also enables your suppliers to review schedule, invoice, payment, order, and receipt activity as well as view their account balances and the invoices related to those balances.

Suppliers can also provide you with transactional information, online and in realtime, by responding to request for quotes (RFQs), creating Purchase Order Acknowledgments and entering Advance Shipping Notices.

Before your suppliers can use the self-service transactions, they need access to the system. PeopleSoft self-service security for suppliers enables suppliers to give their own employees access to vendor self-service transactions, and frees your administrators from this task. At the same time, your employees retain the power to maintain vendor employees if necessary. Of course, you always control which suppliers have access to your PeopleSoft site, and which data they can view and change. You can also use PeopleSoft self-service security for suppliers to enable transaction access that matches the needs of different functional roles within the vendor organizations.

PeopleSoft eSupplier Connection is a supplier-based internet application that is both simple and easy to understand for the casual user. Suppliers need not be familiar or trained in using PeopleSoft software to use PeopleSoft eSupplier Connection.

PeopleSoft eSupplier Connection Integrations

PeopleSoft eSupplier Connection integrates with PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Supply Planning.

We discuss integration considerations in the implementation chapters in this PeopleBook

PeopleSoft Purchasing and PeopleSoft eProcurement

PeopleSoft eSupplier Connection uses PeopleSoft Purchasing information for the purchase order, purchase order schedule, and receipt inquiries. This includes purchasing information created from integrations with PeopleSoft eProcurement or PeopleSoft Strategic Sourcing.

PeopleSoft Payables

Your suppliers can use PeopleSoft eSupplier Connection to retrieve information from PeopleSoft Payables about existing invoices, receipts, payments, and account balances using the review activity pages.

PeopleSoft Supply Planning

If you have PeopleSoft Supply Planning installed, suppliers can use the View Schedule transaction to view Planned Purchase Orders updates.

PeopleSoft eSupplier Connection Implementation

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

Other Sources of Information

In the planning phase of 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 8.8 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, “PeopleSoft Application Fundamentals PeopleBook Preface,” Additional Resources

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

CHAPTER 2

Maintaining Vendor Information

This chapter provides an overview of vendor information maintenance, lists self-service security prerequisites, discusses self-service security for vendors, and discusses how to:

- Maintain external users.
- Maintain vendor address information.
- Maintain vendor contact information.
- Send email messages.

Understanding Vendor Information Maintenance

PeopleSoft eSupplier Connection is a self-service web application that features employee-facing (internal) and supplier-facing (external) transactions that enable your suppliers to view and modify their own business information at their convenience.

Suppliers can add and update their own vendor addresses, email, and phone information in the system. They can also review, edit, and add contact information.

As soon as suppliers save their changes, your PeopleSoft database is updated.

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, “Maintaining Vendor Information”

Prerequisites

Before suppliers can use PeopleSoft self-service transactions, they need access to the system. PeopleSoft self-service security enables vendor administrators to give their employees access to vendor self-service transactions.

You can also enable transaction access for different functional roles within the supplier organizations.

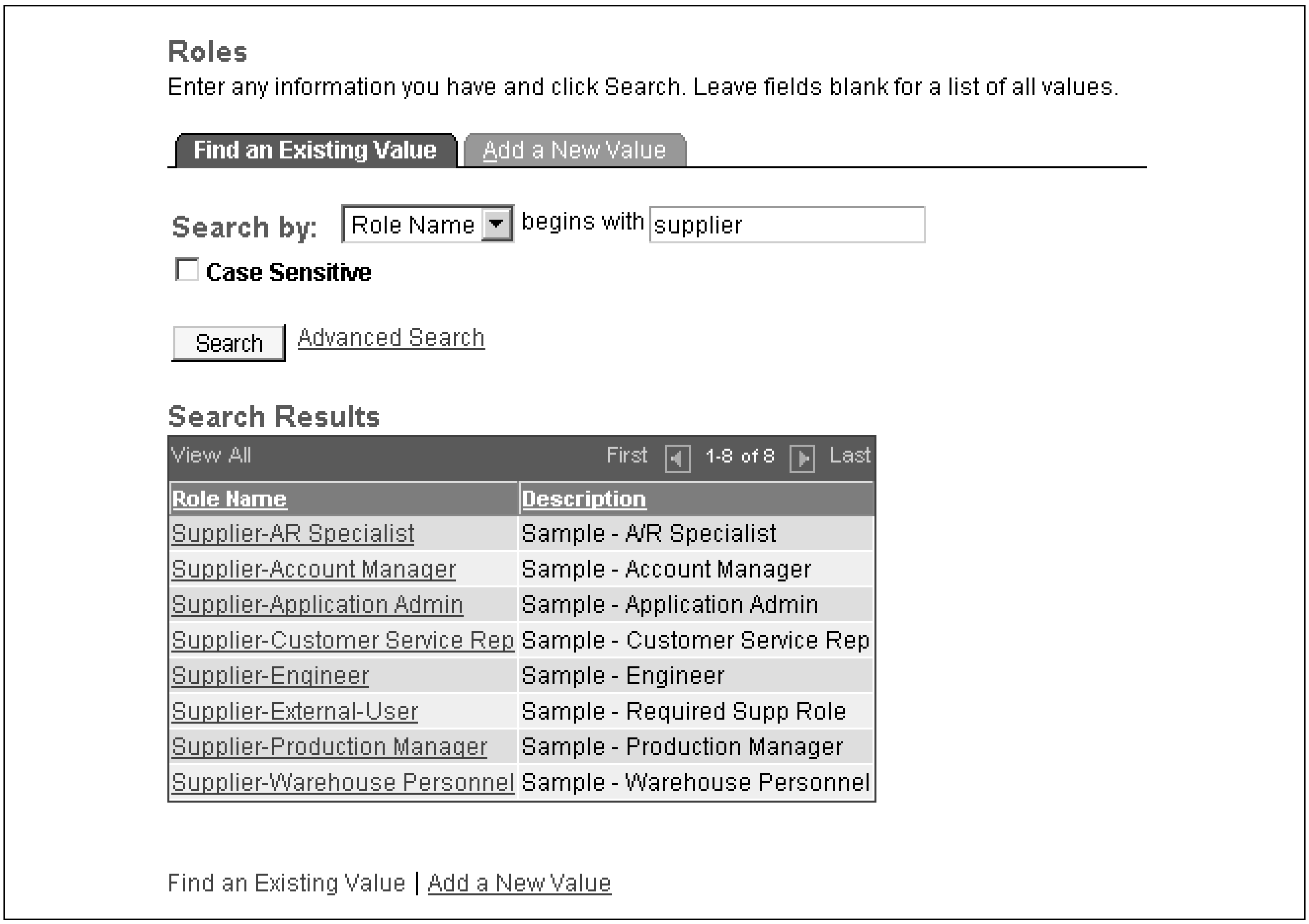
Self-Service Security for Vendors

You establish overall security for PeopleSoft eSupplier Connection just as you do for any other PeopleSoft application: by associating a permission list (which controls access to the system's web page components) with a role and associating the role with a user profile (user ID). Each user has one user profile but can be assigned multiple roles.

Note. Your PeopleSoft users are internal, while your vendors' users are external.

Self-Service Security Sample Data

PeopleSoft delivers sample permission lists, roles, and a user profile (SUPPLIER) as examples of how to set up vendor data and control self-service transactions. This example shows the sample roles that PeopleSoft provides for supplier-facing transactions:



Example of provided roles

Note. All external supplier users must be assigned the Supplier - External User role (or one with similar permissions) to access the PeopleSoft system-it features PeopleTools-related permissions that control personalization and navigation access. In addition, if your installation includes the PeopleSoft Enterprise Portal, all external supplier users must also be assigned the PAPP_USER role (or one with similar permissions). The role contains the permissions that are necessary for homepage personalization and configurations.

To view the sample permission lists that are associated with the provided supplier roles:

1. Access the Roles component in PeopleTools Security.
2. Select a sample supplier role from the list on the Roles search page.

   The Permission Lists page in the Roles component displays the associated sample permission lists.
3. Click View Definition to access the Permission List component, where you can view the pages that are enabled by the selected permission list.

Internal Supplier Administrators

To set up security for external PeopleSoft eSupplier Connection users, at least one internal user-the supplier application administrator-must be assigned the PeopleSoft Supplier-Application Admin role. With this role, the administrator can create and update user IDs (except his or her own) to grant external vendor access to PeopleSoft eSupplier Connection. Vendors must first be assigned at least one vendor ID as part of user ID creation.

To set up external users, use the internal Vendor User pages (Vendors, Vendor Setup/Maintenance, and Vendor User).

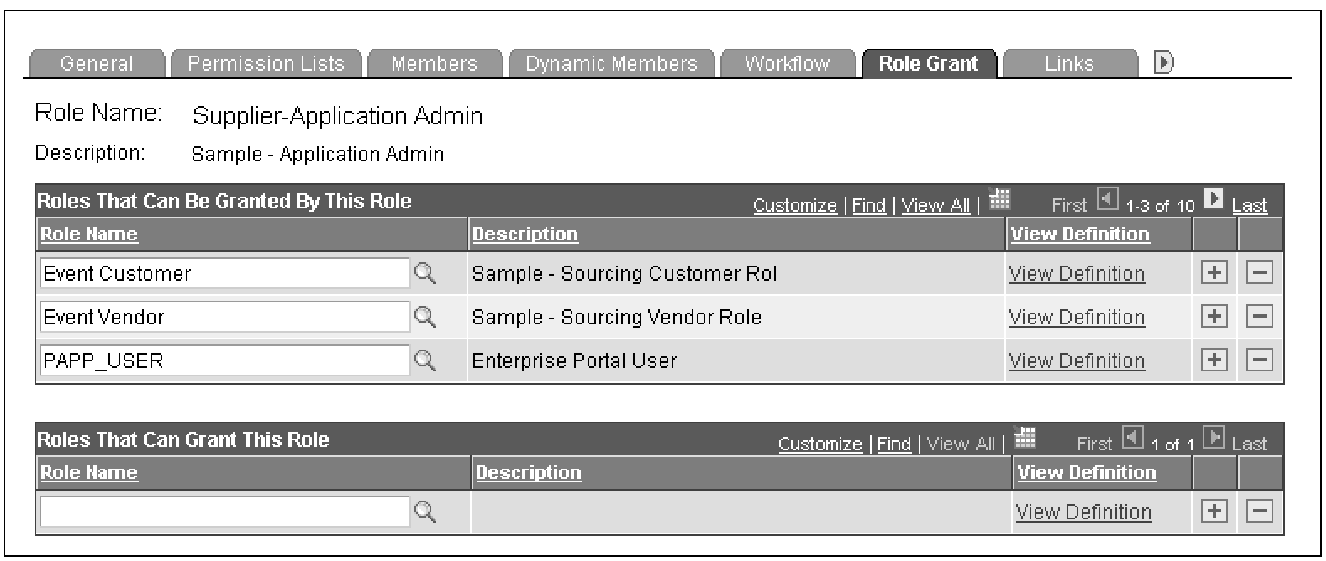
External Supplier Administrators

To enable external users to administer security, the internal supplier application administrator must assign the Supplier-Application Admin role to at least one external user who belongs to each vendor ID.

External vendor administrators can:

- Create and update users within the vendor ID to which they have access.
- Grant self-service transaction access to the vendor IDs to which they have administrative access.

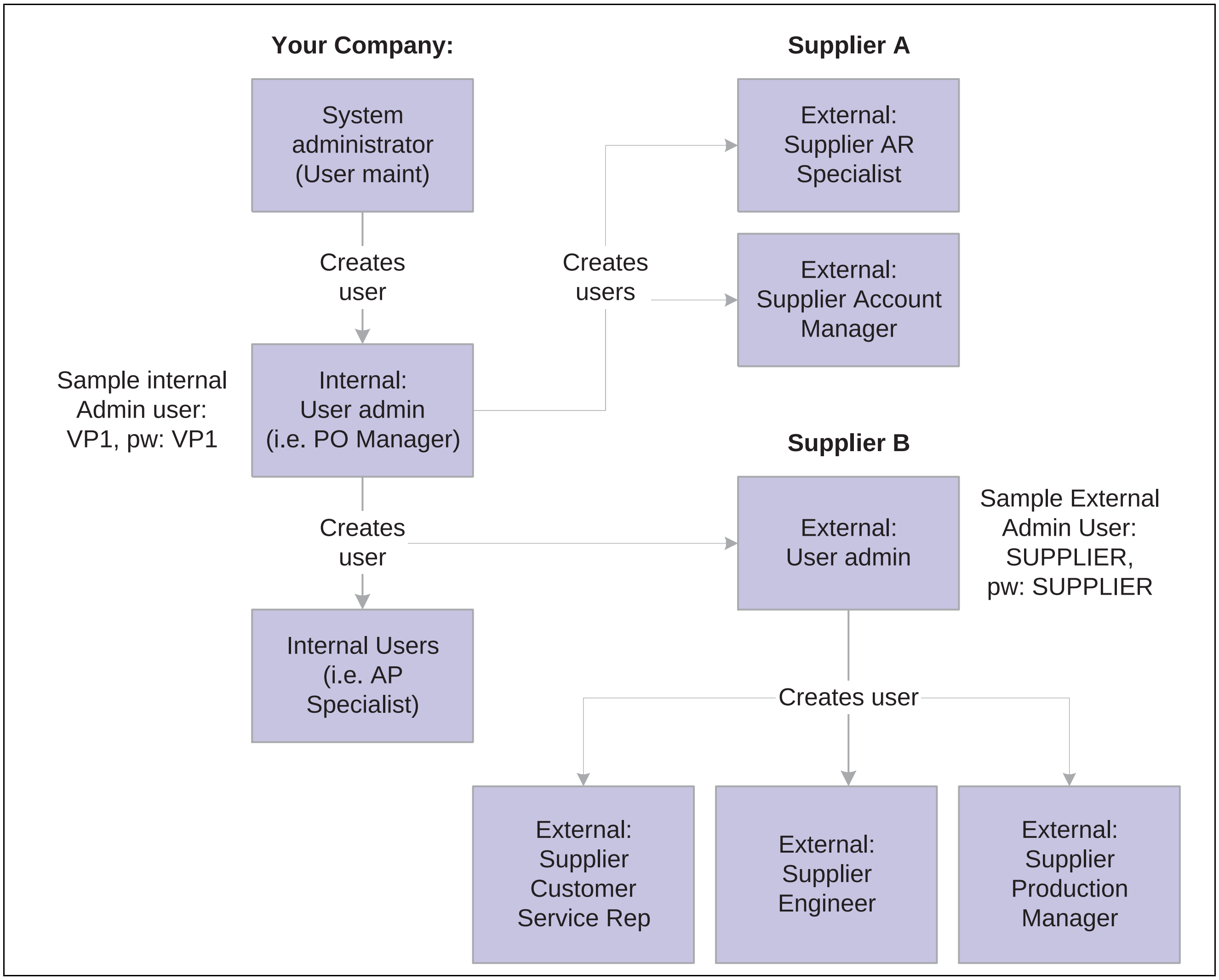
You can assign a variety of roles to the vendors’ users. To enable an administrative user to create new users and grant new user roles, that user must have role grant capabilities, which you define on the Role Grant page within PeopleTools.



Role Grant page example

User Maintenance Example

This diagram provides an example of internal- and external-based user maintenance flow:



User maintenance example

See Also

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, "Maintaining Vendor Information," Vendor Profiles

PeopleTools 8.44 PeopleBook: Workflow Technology

PeopleTools 8.44 PeopleBook: Security Administration

Maintaining Users

Once your supplier application administrators define them, your suppliers' administrators can perform their own user maintenance.

This section discusses how to:

- Perform vendor user setup.
- Maintain external users.

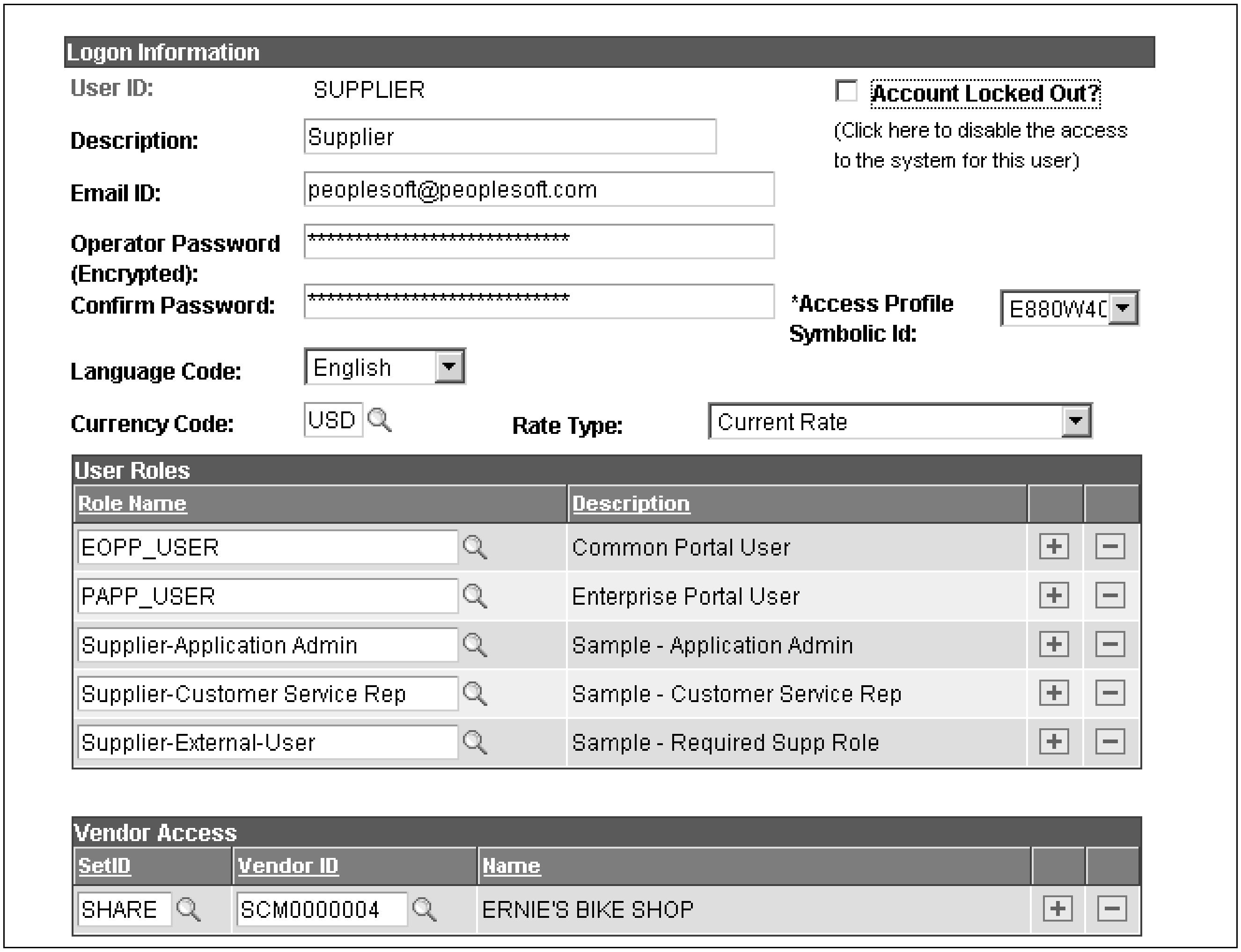
Pages Used to Maintain Users

Page Name	Object Name	Navigation	Usage
Vendor User Setup	UM_DISTR_VNDR_INT	Vendors, Vendor Information, Add/Update, Define Vendor User(internal)	Internal users with the Supplier Application Administrator role can create external administrators, give other internal users access to vendor IDs, and create or update vendors' users.
Security - Setup User	UM_DISTR_VNDR_EXT	Maintain Supplier Information, User Profiles(external)	External vendor administrators can create and maintain their own vendor users and give them access to vendor data.
Add Vendor	EXT_VND_SELECT	Click the Add A Supplier button on the Security - Setup User page.	Suppliers can add new vendors to be assigned to vendors' users.

Performing Vendor User Setup

Use the Vendor User Maintenance component to set up vendor users.

Access the Vendor User Setup page.



Vendor User Setup page

To set up vendor users:

1. Enter logon information, completing these fields in particular:

   Account Locked Out? Select to disable this user's access to the PeopleSoft system.

   Access Profile Symbolic ID Each user ID has an encrypted access profile. Select a symbolic ID to use as a search key or intermediary between the user ID and the access ID.

   See *PeopleTools 8.44 PeopleBook: Security Administration*

   Language Code Select a base language for the user.

   Rate Type PeopleSoft MarketPay uses this field.

2. Assign roles to the user.

Note. To set up security for external users, you must assign the PeopleSoft Supplier Application Administrator role to internal users. See Self Service Security for Vendors.

See Chapter 2, "Maintaining Vendor Information," Self-Service Security for Vendors, page 4.

3. Associate (existing) vendor IDs to the user.

   Each user ID can be associated with one or multiple vendor codes. This enables the user to view and, with the proper permissions, maintain data for the associated vendors. When the user logs in to PeopleSoft eSupplier Connection, the system determines to which vendor the user is associated. If the user is associated with multiple vendors, the Select Vendor page lists the vendors.

   See *PeopleTools 8.44 PeopleBook: Security Administration*

Maintaining External Users

Access the Security - Setup User page.

The values on this page duplicate the fields on the Vendor User Setup page, but they apply to external users only and are designed for the casual self-service user.

See Also

Chapter 2, "Maintaining Vendor Information," Self-Service Security for Vendors, page 4

Maintaining Vendor Address Information

This section lists the pages used to maintain vendor address information.

Pages Used to Maintain Vendor Address Information

Page Name	Object Name	Navigation	Usage
Maintain Addresses - Select Vendor	PO_SS_VND_LIST	Maintain Supplier Information, Addresses	Suppliers select a vendor to navigate to its inquiry or maintenance pages. This page is available only if more than one vendor is associated with the user.
Maintain Addresses - Current Addresses	PO_SSVNDR_CURADDR	Maintain Supplier Information, Addresses Select a vendor on the Maintain Addresses - Select Vendor page.	Suppliers access pages to view, add, or maintain address, email, and phone information.
Maintain Addresses - Address Information	PO_SSVNDR_ADDRDTL	Click one of the following on the Maintain Addresses - Current Addresses page: A Description link to view detailed address information. The Edit button to access the page in Correction mode. The Add a New Address button to access the page in Update mode.	Suppliers can view, add, or maintain address, email, and phone information. **Note.** The fields on this page vary according to the country that is selected.
Maintain Addresses - Future Address Information	PO_SSVNDR_ADDRFDTL	Click the Future Addresses link on the Maintain Addresses - Address Information page.	Suppliers can review addresses that are not yet in effect and add or edit future addresses. **Note.** The fields on this page vary according to the country that is selected.

Maintaining Vendor Contact Information

This section lists the pages used to maintain vendor contact information.

Pages Used to Maintain Vendor Contact Information

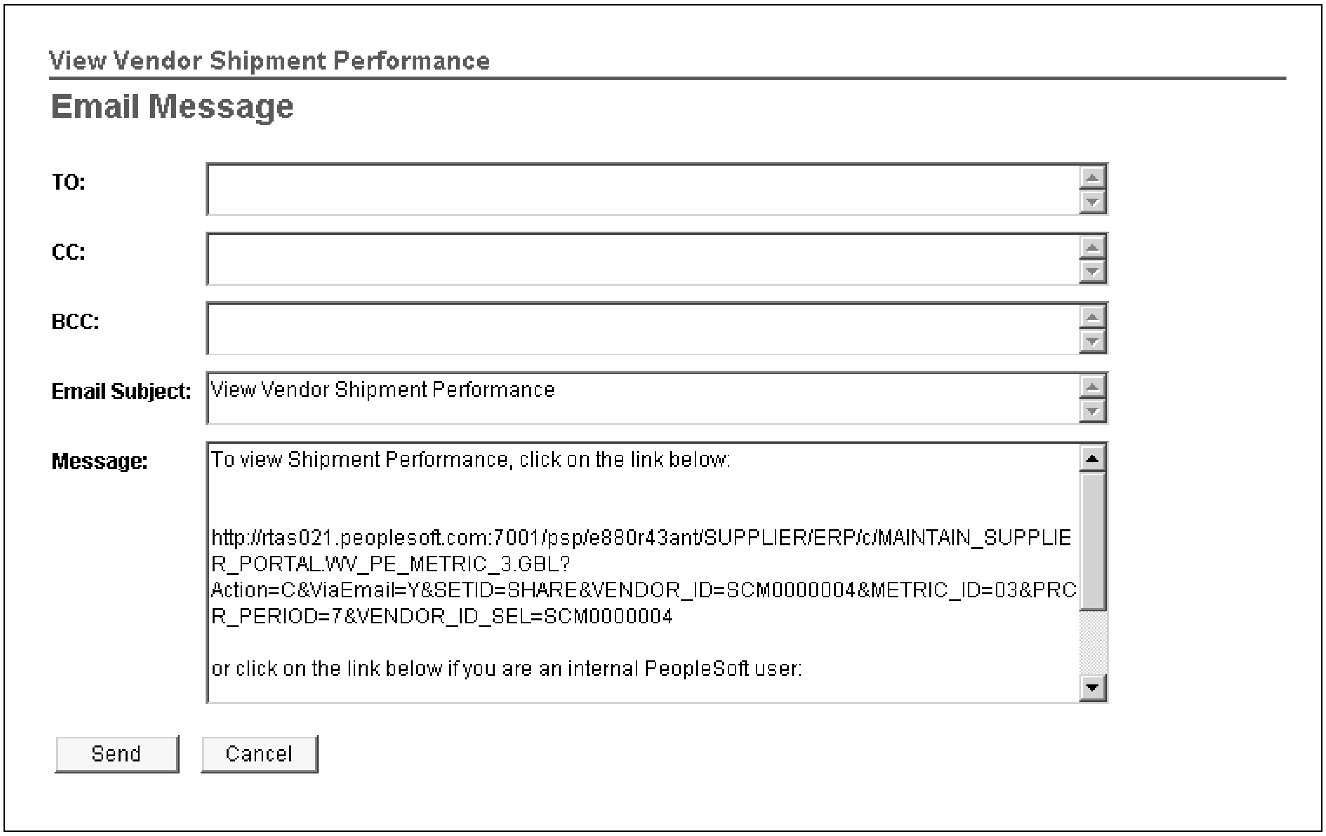
Page Name	Object Name	Navigation	Usage
Maintain Contacts - Select Vendor	PO_SS_VND_LIST	Maintain Supplier Information, Contacts	Suppliers select a vendor to navigate to its inquiry or maintenance pages. This page is available only if more than one vendor is associated with the user.
Maintain Contacts - Current Contacts	PO_SSVNDR_CURCNTCT	Maintain Supplier Information, Contacts Select a vendor on the Maintain Contacts - Select Vendor page.	Access pages to view, add, or maintain current contact information.
Maintain Contacts - Contact Information	PO_SSVNDR_CNTCTDTL	Click one of the following on the Maintain Contacts - Current Contact page: A Description link to view detailed address information. The Edit button to access the page in Correction mode. The Add a New Contact button to access the page in Update mode.	View, add, or maintain current contact information.
Maintain Contacts - Future Contacts	PO_SSVNDR_CNTFTDTL	Click the Future Contacts link on the Maintain Contacts - Contact Information page.	View, add, or edit contacts to go into effect on a future date.

Sending Email Messages

The Email Message page is accessible from several supplier- and employee-facing pages. Users can send an email that contains a link to the page from which the Email Message page was accessed.

The body of the message contains two URLs: one that an internal recipient uses to access the referenced page through the PeopleSoft Enterprise Portal, and one that an external recipient uses to access the page through an external portal (in this case, the supplier portal registry). Even though the recipients get a URL, they need the correct privileges to access the system.

For example, a supplier who sends email notification from one of the pages in the View Vendor Shipment Performance component would use this version of the Email Message page:



Email Message page example

CHAPTER 3

Maintaining RFQ Responses

This chapter provides an overview of the eRFQ feature, lists common elements, and discusses how to:

- Alert vendors about dispatched requests for quotes (RFQs).
- Review and respond to RFQs.

Understanding the eRFQ Feature

Complex quoting and contracting procurement processes require extensive communication, collaboration, and negotiation between buying and selling organizations, and are critical to establishing long-term partnerships with trusted suppliers. In today's environment, traditional applications do not facilitate realtime communications and collaboration between trading partners. PeopleSoft eSupplier Connection's eRFQ feature enables your suppliers to use an internet browser to review and respond to RFQs that are generated in PeopleSoft Purchasing.

eRFQ Process Flow

The buyer:

1. Creates and dispatches the RFQ in PeopleSoft Purchasing.

   Before a supplier can view and respond to an RFQ in PeopleSoft eSupplier Connection, you must create it, use the Dispatch Vendor List or the Item Supply Vendor List to assign the RFQ to the vendor, and dispatch it to the vendor. When dispatching by email, the email includes a link which returns the supplier back to the RFQ to respond.

2. Alerts the vendor to the RFQ.

   You can set up automatic workflow notification if your installation includes PeopleSoft Enterprise Portal, or you can generate an email that contains a URL to send the supplier directly to the RFQ details as part of the dispatch process.

The supplier:

1. Accesses the RFQ in PeopleSoft eSupplier Connection.

   If the supplier accesses the RFQ component using the portal menu, the Request for Quote List page displays the RFQs that meet the search criteria. The supplier can also access the component using the RFQ pagelet.

2. Reviews new RFQs and submits responses.

   The supplier can review requested items and submit responses by item regarding information such as quantity, price, date, and lead time.

When the supplier submits a response, the system captures and date- and time-stamps the current RFQ details and the supplier’s response. This enables the buyer to review supplier responses even if the RFQ or response information subsequently changes The RFQ response status also changes in PeopleSoft eSupplier Connection to *Responded*, and now you can view or maintain the RFQ response in PeopleSoft Purchasing.

Note. The buyer can view or maintain the RFQ or RFQ responses after the RFQ is dispatched; the buyer does not need to await supplier response to access it through PeopleSoft Purchasing.

RFQ Response Modification

The buyer can propose a change to the quote by reopening the RFQ line (by clearing the Responded check box) and directly changing the price, quantity, due date, or other fields on the RFQ Response (request for quote response) page in PeopleSoft Purchasing.

Upon saving the changes, the system changes the RFQ status back to *New* (as seen by the vendor), and now the vendor can enter a new response to the RFQ.

Note. The system does not capture buyer changes to RFQ responses in the RFQ history.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Managing Requests for Quotes,” Maintaining RFQ Responses

Common Elements Used in This Chapter

Item ID and **Vendor Item ID** These are the vendor item identifiers, if defined for the selected vendor-item combination on the Purchasing Attributes - Item Vendor page. If no vendor-item information exists, then your item ID appears.

Alerting Vendors About Dispatched RFQs

You can alert suppliers by email (or, if your installation includes PeopleSoft Enterprise Portal, by a task list entry using the Integrated Task List pagelet) that you have dispatched a new RFQ to them.

This section discusses how to:

- Automatically email RFQ alerts.
- Send workflow task list alerts.

Automatically Emailing RFQ Alerts

To set up automatic RFQ dispatch alert emails to your suppliers:

1. Ensure that the supplier contact is specified on the RFQ and that the contact’s email address is specified on the Vendor Information - Contacts page.

If you do not specify the contact on the RFQ, or if the contact email address is missing, the system sends an email to the supplier's email address that you specify on the Vendor Information - Address page.

2. Run the RFQ Print/Dispatch SQR process (PORFQ01) and the Email Application Engine process (PO_RFQ_EMAIL) in PeopleSoft Purchasing.

Note. Because you must run the RFQ Print/Dispatch process before sending an alert with the Email process, run RFQDISP job, which runs both processes sequentially.

An email that is sent to a supplier regarding a dispatched RFQ contains a link that points to the Request For Quote List page (bypassing the search page) so that your supplier can view the RFQ. The email can also include the RFQ as an attachment.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, "Managing Requests for Quotes," Dispatching RFQs

Sending Workflow Task List Alerts

While the task list processes function independently of PeopleSoft's self-service applications and dispatch-based alerts, you can optionally use workflow to add a task item to the Integrated Task List pagelet if:

1. You are using PeopleSoft Workflow and:
    a. You have set up the PO_RFQ_DISPATCH business process.
    b. Workflow activity is *Active*.
2. Your installation includes PeopleSoft Enterprise Portal.

When the supplier selects a task item, the Request for Quote List page opens, displaying the quote. The system marks the task item as *worked*, and it no longer appears on the Integrated Task List pagelet.

Note. If you give vendors the appropriate privileges, they can access task list entries or worklists through PeopleTools.

Enabling Users to See Task List Items for Specific Vendors

To view task list entries for demonstration purposes, the workflow activity (PO_RFQ_DISPATCH) is set up to use the Supplier-Customer Service Rep role. In addition, this role routes the control profiles that include the required route control types or the role that you define within the PO_RFQ_DISPATCH business process workflow activity.

Use two route control profiles:

1. Supplier includes three route control types:
    a. Vendor.
    b. Vendor_Loc (vendor location).
    c. TableSet ID.
2. Admin Area PO includes Administrative Area.

Before a task list item appears on the Integrated Task List pagelet, the PO_RFQ_DISPATCH workflow activity validates that ROLENAME = Supplier-Customer Service Rep (or role that you defined and assign to the activity). It also validates that these route control type values (for the route control profile for the user) match these values:

- Administrative Area = PO.
- TableSet ID = VENDOR_SETID.
- Vendor = VENDOR_ID.
- Vendor_Loc = VNDR_LOC of RFQ.

See Appendix A, "Delivered Workflows for PeopleSoft eSupplier Connection 8.8," page 89.

Note. The SetID, vendor, and vendor location are defined on the RFQ.

If all of these conditions are met, the system creates a task list item for the user. Depending on the setup, a task list item for the same RFQ-supplier-item combination might appear in multiple user task lists.

See Also

PeopleTools 8.44 PeopleBook: Workflow Technology

PeopleTools 8.44 PeopleBook: Security Administration

Reviewing and Responding to RFQs

This section discusses how to:

- Search for RFQs.
- Review RFQ lists.
- View RFQ details.
- Respond to RFQs.
- Review RFQ response history.

Pages Used to Review and Respond to RFQs

Page Name	Object Name	Navigation	Usage
Request for Quotes - Select Vendor	PO_SS_VND_LIST	Process Quotes, Respond to Quote	Suppliers select a vendor to navigate to its RFQ inquiry pages. This page is available only if more than one vendor is associated with the user.

Page Name	Object Name	Navigation	Usage
Request for Quotes - Filter Options	PO_SSSRCH_RFQ	Process Quotes, Respond to Quote Click the Show all/Enhanced link on the Recently Dispatched RFQs pagelet.	Search for specific RFQs. This is the initial search page that the supplier sees when associated with only one vendor.
Request for Quotes - Request for Quote List	PO_SSRFQ_RESP_LINE	Click the Search button on the Request for Quotes - Filter Options page. Click an RFQ ID link on the Recently Dispatched RFQs pagelet.	View general RFQ information and a list of items by RFQ to which to respond.
Request for Quotes - Request for Quote Detail	PO_SSRFQ_LN	Select an RFQ ID on the Request for Quotes - Request for Quote List page.	Review RFQ details for a specific item.
Billing Address	PO_SSSEC_BILL_ADDR	Select a billing location on the Request For Quote Detail page.	View billing address and telephone details.
Shipping Address	PO_SSSEC_SHIP_ADDR	Select a ship to location on the Request For Quote Detail page.	View shipping address and telephone details.
Request For Quote Response	PO_SSRFQ_RESP	Click the New or Responded button on the Requests For Quote List page.	View or respond to RFQs. This is the primary page that a supplier uses to respond to a specific RFQ item.
Email Message	WV_PE_EMAIL_SP	Click the Send Email link on the Request For Quote Response page.	Send an email to someone regarding the quote. This email includes links that can take a supplier to the Request for Quote List page or take you (an internal PeopleSoft user) to the PeopleSoft Purchasing Request For Quotes page or the RFQ Response page.
Request for Quote History	PO_SSRFQ_RESPONSE	The supplier clicks the View History link on the Request for Quote Response page; the buyer clicks the Supplier History button on the RFQ Response page	View original RFQ details and supplier responses.

Searching for RFQs

Access the Request for Quotes - Filter Options page.

Note. Your suppliers can review only those RFQs for which they have security. Also, the system retrieves only dispatched RFQs with a status of *Approved* or *Closed;* it ignores RFQs with *Open, On Hold,* and *Canceled* statuses.

See *PeopleSoft Purchasing PeopleBook,* “Managing Requests For Quotes,” Dispatching Requests For Quotes.

The supplier selects the criteria with which to filter the search. In particular:

View Current Quotes The system retrieves RFQs based on whether the supplier selects this or View Closed Quotes and on which values the supplier selects in the Include Quotes field.

If the supplier selects this option and the New (Dispatched) field, the system displays all of the approved open RFQs (whose bidding dates haven’t passed) to which this supplier has not responded.

If the supplier also selects Responded, then the system displays all of the approved open RFQs to which this supplier has responded.

If the supplier also selects New (Dispatched) and Responded, then the system displays all of the approved open RFQs that are assigned to the supplier.

View Closed Quotes If the supplier selects this option and New (Dispatched), then the system displays closed RFQs to which the supplier has not responded.

If the supplier also selects Responded, the system displays all of the closed RFQs to which this supplier has responded.

If the supplier also selects New (Dispatched) and Responded, the system displays all of the closed RFQs.

Search Click to initiate the search and view the results on the Request for Quotes - Request for Quote List page.

Reviewing RFQ Lists

Access the Request for Quotes - Request for Quote List page.

The system displays any RFQs that are associated with the vendor.

RFQ ID Click an RFQ ID to access the Request For Quote Detail page.

Respond This button label changes depending on the RFQ status *(New* or *Responded).* Once the supplier submits a response per RFQ item, the label changes to Responded, and the response is visible on the buyer side.

Viewing RFQ Details

Access the Request for Quotes - Request for Quote Detail page.

The system displays RFQ details.

Billing Location Click to view specific billing address and phone information.

Ship To Location Click to view specific shipping location and phone information.

Comments and Attachments If you want your suppliers to see any comment or attachments, you must specify that they can view them as you enter them on the RFQ. You make this specification on the RFQ Header and Line Comments page (select the Send to Vendor check box) in the Requests for Quotes component in PeopleSoft Purchasing.

Responding to RFQs

Access the Request For Quotes - Request For Quote Response page.

The status of the RFQ response (by item) determines the mode of this page:

- When the supplier accesses this page by clicking New on the Request for Quote List page, several supplier response fields are available for modification, including Quantity, Price, and Schedule Date.

  The New button appears when an RFQ item requires a response from the buyer.

- When the supplier clicks the Responded button, this page is display-only.

  The Responded button appears when this supplier has previously entered a response for the RFQ item.

Submitting RFQ Responses

To respond to an RFQ:

1. On the Request for Quote List page, click the New button for the RFQ ID to which you want to respond to access the Request for Quote Response page.

   Note. An RFQ’s *New* status can be the result of the buyer reopening the line for further response; it does not necessarily indicate that this is the first time that the supplier has received or responded to the RFQ. See Reviewing RFQ Response History.

2. Many of the following field values appear by default from the actual RFQ.

   In addition to the fields to which suppliers would most commonly respond (such as Price, Quantity, Unit of Measure, Lead Time Days, and Schedule Date), they can also respond to related fields, including:

   Salesperson The supplier’s employee who is responsible for your purchase.

   Date Time Responded The date and time that the supplier submitted a response for this item. The system maintains this field.

   Vendor Item ID Suppliers can use this field to notify buyers of new or changed vendor item IDs.

   Note. This does not automatically update the Vendor Item ID table in the PeopleSoft system.

   Description Notifies the buyer of the supplier’s item description.

   Minimum Quantity The minimum quantity that the supplier is willing to quote.

Note. Supplier responses are made on an item-by-item basis. However, several editable fields on the Request for Quote Response page include header values and vendor comments. When the supplier changes these values during an RFQ item response, the system stores them at the header level of the RFQ response. Thus any changes of the most recent item response are present on the buyer side. The response history displays any changes to these values as they occur response by response.

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3. After entering any changes or comments, submit the response.

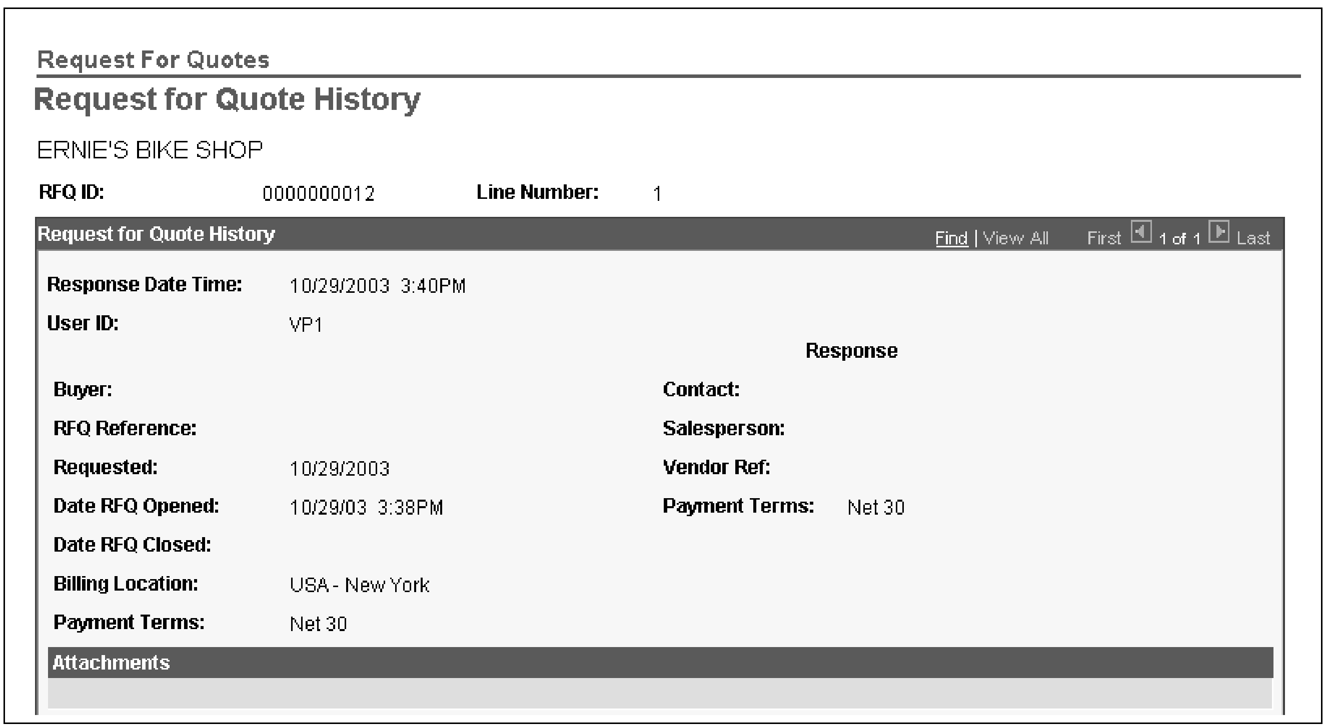
Submit Click to submit the response so that it can be viewed on the internal RFQ pages in PeopleSoft Purchasing. After clicking Submit, if the supplier chooses to continue, he or she can no longer edit the RFQ response but can still view it in read-only mode. Upon submission, the system stores supplier response history for the RFQ item to which the supplier is responding.

Send Email Click to open the Email Messages page and send an email to an internal or external party about the quote.

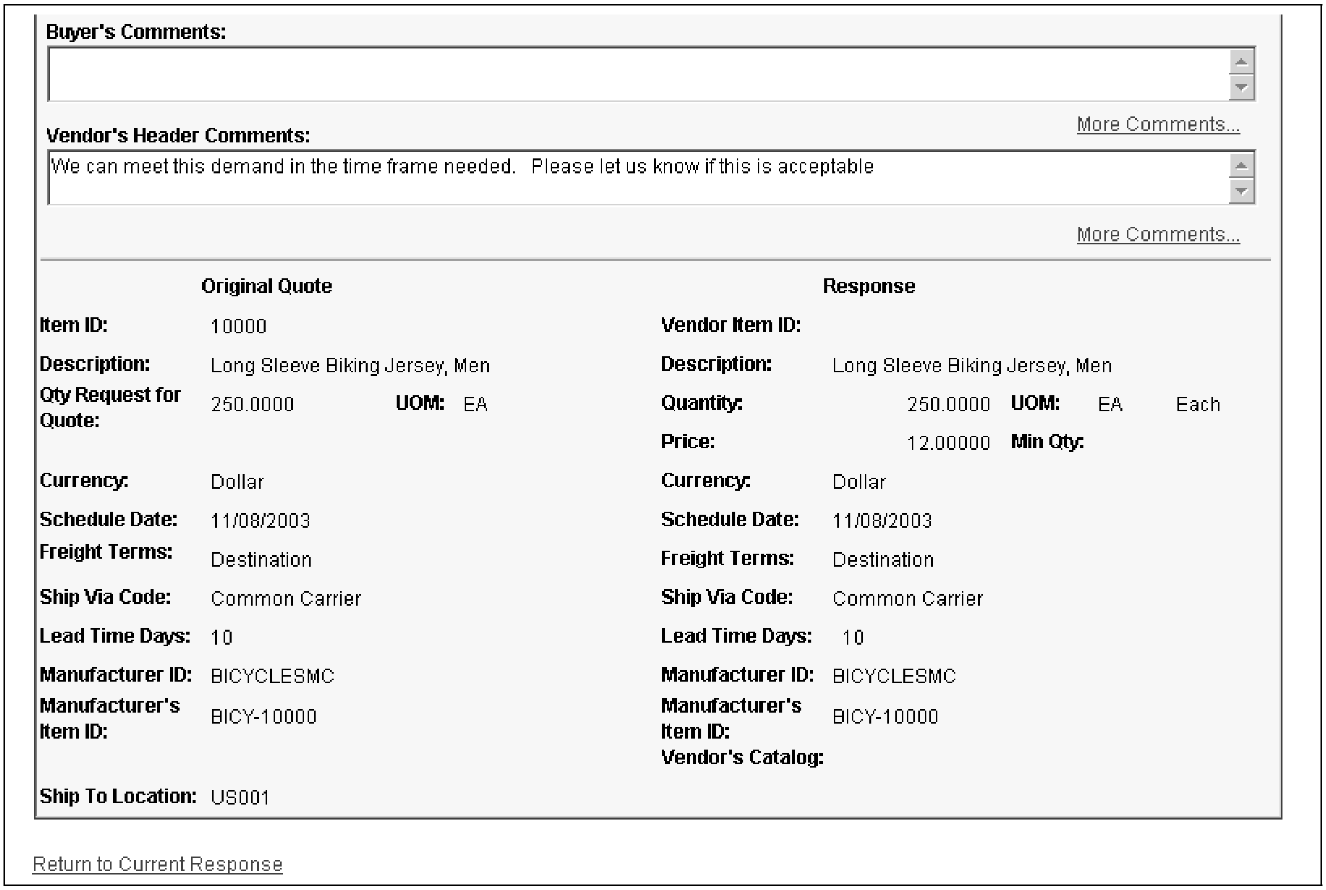
See Chapter 2, “Maintaining Vendor Information,” Sending Email Messages, page 11.

Reviewing RFQ Response History

Access the Request for Quote History page.



Request for Quotes - Request for Quote History page (1 of 2)



Request for Quotes - Request for Quote History page (2 of 2)

To view RFQ response history, the supplier clicks View History on the Request for Quote Response page; the buyer clicks the Supplier History button on the RFQ Response page.

The Request for Quote History page displays RFQ header details, the line details from the original RFQ at the time that the response was made, and the vendor’s response. (There can be multiple vendor responses for the same RFQ line.)

Buyer’s Comments	Displays the comments that the buyer entered on the RFQ Header Comments page when submitting the original RFQ.
Vendor’s Header Comments	The vendor can enter multiple comments on the Request for Quote Response page (for each time the vendor responds to an RFQ). The system stores these comments at the header level, not the item level, of the RFQ.
Return to Current Response	The buyer clicks this link to return to the RFQ Response page in PeopleSoft Purchasing; the supplier clicks it to return to the Request for Quote Response page in PeopleSoft eSupplier Connection.

Note. You can also view a single RFQ response using the Response By Vendor inquiry page in PeopleSoft Purchasing.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Managing Requests for Quotes,” Inquiring and Reporting on RFQs and Vendor Responses

PeopleSoft Purchasing 8.8 PeopleBook, “Managing Requests for Quotes,” Maintaining RFQ Responses

CHAPTER 4

Acknowledging Purchase Orders Online

PeopleSoft eSupplier Connection enables your suppliers to enter purchase order acknowledgements (POAs) directly into the system, bypassing the need to perform the transaction using an electronic data exchange (EDX) method. This online POA feature enables buyers and suppliers to collaborate on any acknowledgement issues in realtime and capture the supplier response history and PO details at the time acknowledgements are made.

In this chapter, we provide an overview of online POAs, and discuss how:

- Your suppliers create POAs.
- Your buyers review and approve online POAs.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements

Understanding Online PO Acknowledgements

Your buyers and suppliers can collaborate more efficiently when both maintain POAs online.

The online POA business process follows these general steps:

1. The PO is dispatched to the vendor.

   When PeopleSoft eSupplier Connection is installed and the email dispatch method is used, an URL is provided to bring your suppliers back into your supplier portal and to the specific POA. This is done for initial dispatching of POs as well as change order dispatches. When a change order is dispatched, the email indicates that the order is a change order including the change order number. Within the POA, the latest changes associated to the change order number are shown to the supplier for review and acknowledgement.

2. The vendor creates an online acknowledgement using the Purchase Order Acknowledgement component, and can:

   a. Accept or reject the PO in its entirety, or at the line item level.

   b. Suggest changes to prices, quantities, shipping methods, or delivery dates.

   c. Indicate backorder schedules and suggest splitting schedule lines if required.

   d. Save a POA in progress for later submission.

   e. Submit the POA for buyer approval.

Note. If there are no changes to the POA, the status is automatically set to *Buyer Accepted* since there is nothing for the buyer to approve.

Note. A workflow option is included which sends notification to the buyer when a supplier creates a POA specifying changes. To enable this workflow, activate the event Buyer Notify within activity PO_ACKNOWLEGEMENT; this adds worklist entries for the buyer user associated to the purchase order that link to the buyer side PO Acknowledgement page.

See Appendix A, "Delivered Workflows for PeopleSoft eSupplier Connection 8.8," page 89.

f. Send an adhoc email to the buyer or other external users containing a link to access the POA directly (the recipient must have proper security to the page).

g. Collaborate on any further issues with the buyer.

   For example, if the buyer is not satisfied with the vendor response, he can enter comments and reset the status back to *Supplier Review* so that they can continue to collaborate until the issues are resolved.

3. The buyer uses the Acknowledge Purchase Orders component in PeopleSoft Purchasing to view supplier-entered POAs, and can:

   a. Review the changes suggested by the supplier.

   b. Approve a POA.

      The POA can be changed at any time before the Change Request Load process is run. Once the process runs, the POA is display only. Approved POA's feed suggested changes such as quantity, price, and schedule date into the Change Request Load tables, which when approved update the original purchase order.

      Note. You can set up automatic approval for online POA change requests on the Purchasing Definitions - Business Unit Options page. Once approved using the Purchase Order Acknowledgement pages, the changes won't need to be approved again between the Change Request and Change Orders processes.

   c. Return the POA with changes for supplier review.

   d. Send an adhoc email to the supplier or other internal users containing a link to access the POA directly.

PO Acknowledgement Status

POA status is defined at several levels in PeopleSoft eSupplier Connection.

Note. POAs that are submitted to PeopleSoft Purchasing via EDX use a status structure (header, line, and schedule) that refers to the action taken in the POA rather than the collaboration status the POA is in between the buyer and vendor. EDX POAs use a similar approval flow as those submitted online.

See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Orders Online," Reviewing Acknowledgement Header Information.

Acknowledgement Status

The stage of the dispatched PO, and its subsequent acknowledgement by the supplier, applies to the entire POA and determines the following:

New	The PO has not been acknowledged, or has been redispatched because of a change order and requires new acknowledgement.
Supplier Review	The supplier is working on the POA, which cannot be viewed or edited by anyone else at this stage.
Supplier Responded	The supplier has saved and submitted the POA with changes, which can now be viewed by the supplier, or edited by the buyer.
Buyer Accepted	Both buyer and supplier can only view the POA, which is ready to be processed by Change Request Load process if it includes changes. This is also the default status when a supplier submits the POA without any changes.

This status appears on the:

- Search/Filter Options pages.
- Header section of the Acknowledgement Details pages.
- Recently Dispatched POs pagelet.

Header Response

The action the supplier has taken; applies to the entire POA and indicates to the buyer the following:

Accepted	The supplier has accepted entire purchase order without changes. This is the default response status for new POAs.
Reject with Detail	The supplier has rejected the entire purchase order. All editable fields on the Acknowledgement Details page are reset to the current PO values and the quantity is reset to zero. If approved by the buyer this will cancel the entire PO.
Accepted - Changes Made	The supplier has made changes to the purchase order. This may include changes to line items or schedules, and rejected lines.

This response status appears on the Header section of the Acknowledgement Details pages.

Line Response

Indicates the following:

Accepted	The supplier has accepted the line item without changes. This is the default response status for new POAs.
Reject with Detail	The supplier has rejected the entire line item. The editable fields for the line and schedules are reset to the current PO values and the quantity is reset to zero. If approved by the buyer, this cancels the PO line.
Accepted - Changes Made	The supplier has made changes at the line item or schedule level.

Schedule Status

The action the supplier has taken; applies to the selected schedule, and indicates the following:

New	The schedule is added when supplier splits a row.
Canceled	Caused when a line is rejected or by changing the schedule quantity to zero.
Changed	Any changes to the schedule fields (due date, quantity, shipping method, and price).

Creating Online PO Acknowledgements

Your suppliers can enter purchase order acknowledgements (POAs) directly into your PeopleSoft system.

In this section, we discuss how your suppliers:

- Create and update POAs.
- Search for existing POAs.

Supplier-Facing Pages Used to Maintain PO Acknowledgements

Page Name	Object Name	Navigation	Usage
Acknowledge Purchase Orders - Select Vendor	WV_SS_VND_LIST	Manage Orders, Acknowledge Purchase Orders	Suppliers select a vendor to navigate to its POA pages. Available only if more than one vendor is associated with the user.
Acknowledge Purchase Orders - Search/Filter Acknowledgements	PO_SS_POA_SEARCH	Manage Orders, Acknowledge Purchase Orders. Optionally select a vendor on the Purchase Order Acknowledgement - Select Vendor page. Click the Show All Acknowledgements link on the Recently Dispatched POs pagelet.	Search for dispatched POs awaiting acknowledgement, or existing supplier-entered or EDX-submitted POAs. Also, view past POAs.
Acknowledge Purchase Orders - Acknowledgement Summary	PO_SS_POA_SUMMARY	Click a linked PO number value on the Search/Filter Acknowledgements page. Click a linked Acknowledge Status value on the Recently Dispatched POs pagelet.	Create new POAs, maintain existing POAs, or view accepted POAs. **Note.** EDX POAs are not included.
PO Changes - Details	PO_SSPOLNCHG_SP	Click the Change Order link for changed order lines on the Acknowledgement Details page.	Click a linked PO number on the Manage PO Acknowledgements search page. Review the purchase order line changes for a selected purchase order line.
Acknowledge Purchase Orders - Acknowledgement Details	PO_SS_POA	Click a line on the Acknowledgement Summary page.	View POA line details.
Ship to Comments	PO_SS_SHIPCOMM_SP	Click the Comments button on the Acknowledgement Details page.	Review Ship To comments or attachments for a selected purchase order schedule.

Searching for PO Acknowledgements

Access the Acknowledge Purchase Orders - Search/Filter Acknowledgements page.

This page essentially duplicates the employee-facing Supplier Portal POAs page (as documented later in this chapter), with the following exceptions.

See Searching for Online POAs.

The supplier selects the criteria with which to filter the search. In particular:

From Date, To Date The PO dispatch date range.

View Current Acknowledgements

POAs with a status of New/Supplier Review and Supplier Respond/Buyer Accepted.

See Chapter 4, “Acknowledging Purchase Orders Online,” PO Acknowledgement Status, page 24.

View History

Displays the supplier responded history for past POAs.

PO Status

Displays the change order revision if the line is a change order; otherwise, it indicates that the PO is being dispatched for the first time.

Source of Acknowledgement

Online or EDX.

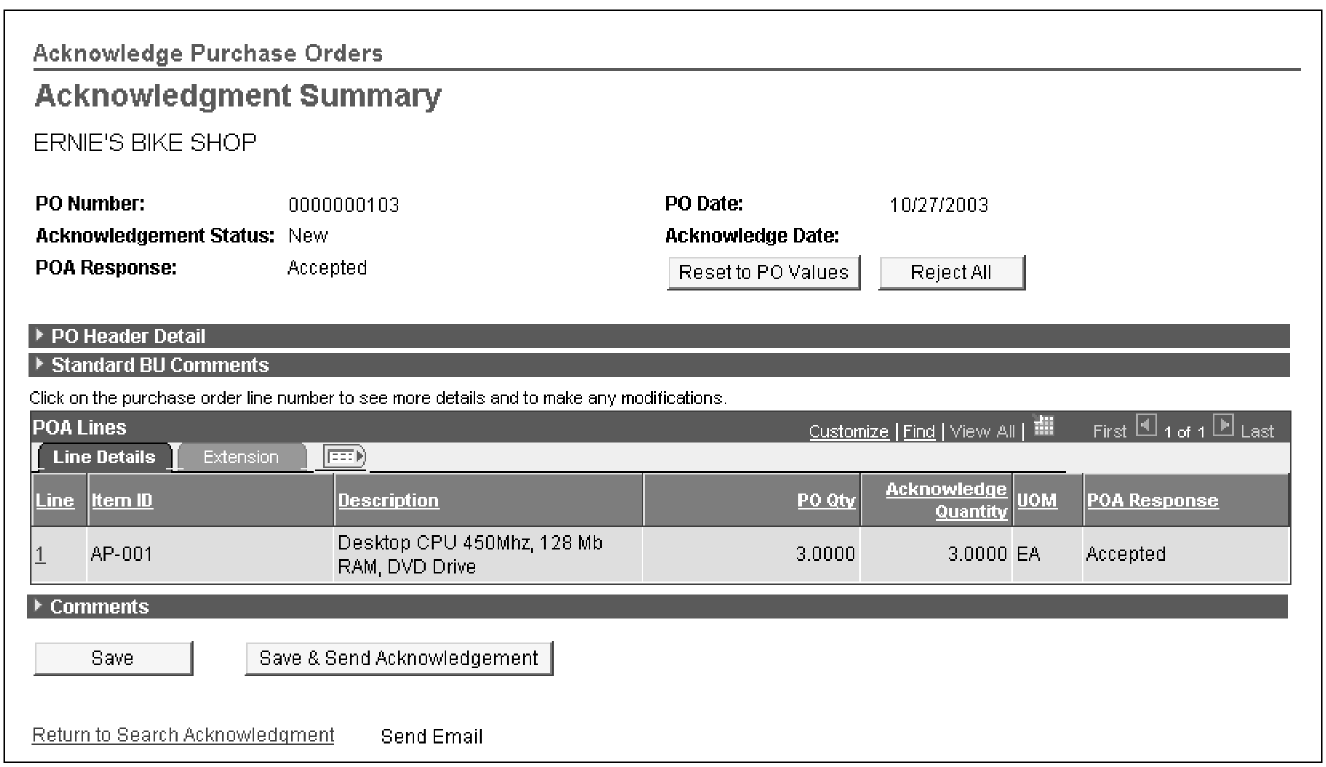
POAs created using PeopleSoft eSupplier Connection POAs are always created as Source of online. Within PeopleSoft Purchasing, online and EDX POAs are consolidated for review and approval on this page. Depending on the Source of the POA clicking the Purchase order number takes the buyer to the Manage PO Acknowledgements page for online collaborative POAs or the Review POA page for EDX which is not collaborative.

See *PeopleSoft Purchasing 8.8 PeopleBook*, “Creating Purchase Orders Online,” Using Purchase Order Acknowledgements.

See *PeopleSoft Purchasing 8.8 PeopleBook*, “Creating Purchase Orders Online,” Reviewing Acknowledgement Header Information.

Creating Online POAs (Suppliers)

Access the Acknowledge Purchase Orders - Acknowledgement Summary page.



Acknowledge Purchase Orders - Acknowledgement Summary

The fields on this page essentially duplicate those on the employee-facing Supplier Portal POAs - Acknowledgement Details page, although your suppliers always access this page in “create” mode, while your employees are limited to “review and approve” mode.

See *PeopleSoft Purchasing 8.8 PeopleBook*, “Creating Purchase Orders Online,” Reviewing Acknowledgement Header Information.

The system displays purchase order or POA history details in view-only fields. The supplier can accept or reject the entire PO or the selected line item, or enter changes in the editable fields. In particular:

Line #

Click the linked line number to review and modify the details of the line such as quantity or date.

Reset to PO Values

Clicking this button restores all POA values to the values specified on the current purchase order, forgoing any changes made by the supplier user or buyer user on the POA

PO Header Details

Clicking the arrow expands the section and displays PO header details.

Save

Saves any changes and sets the acknowledgement status to *Supplier Review.*

Save & Send Acknowledgement

Saves any changes and:

- Changes the POA mode for the vendor from editable to view-only.
- Sets the acknowledgement status to *Buyer Accepted* if there is no change.
- Sets the acknowledgement status to *Supplier Responded* if there are changes the buyer needs to approve. If workflow is enabled, this also sends notification to the buyer for the POA with changes needing review.
- Updates the Purchasing EC tables (PO_POA_HDR_HIST, PO_POA_LN_HIST, PO_POA_SHIPHIST) to capture supplier response history and pertinent PO values at the time the response is made.

Standard BU Comments

Clicking the arrow expands the section. Displays any comments that are associated to the Purchasing BU. If there are no BU level comments, the system doesn’t display this section.

PO Header Comments

Clicking the arrow expands the section. Displays any PO header comments or attachments associated with the selected purchase order. If there are no header comments or attachments, the system doesn’t display this section. If there are multiple rows of header comments/attachments, you can scroll through them or click View All to display all of them.

PO Qty (Quantity)

Displays the sum of all schedule quantities for this line on the PO that is being requested

Acknowledge Quantity

Displays the sum of all schedule acknowledge quantities being replied. The system provides the PO quantity as a default when you first view the PO acknowledgement.

Change Order

Click the Change Order link for each line that has a change order to access more detail about the change. This shows the details of what changes were made from the last time this PO was dispatched. (For example, if this PO is on change order 3, it shows the changes made from change order 2 to change order 3.)

Comments Clicking the arrow expands the section. The supplier can enter comments for the buyer, and in subsequent sessions, view any buyer responses.

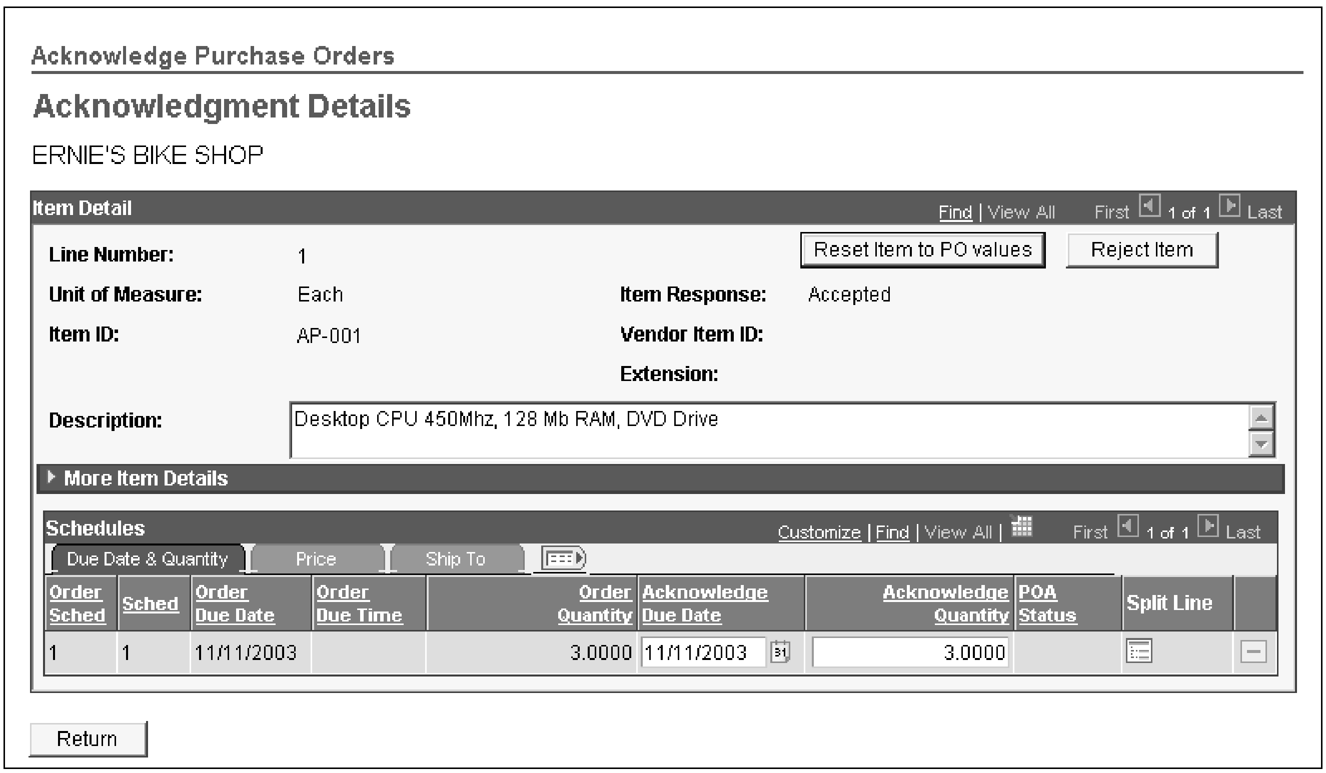
Send Email The supplier can send an adhoc email containing URLs to access the POA directly.

See Also

Chapter 2, "Maintaining Vendor Information," Sending Email Messages, page 11

Viewing and Changing Acknowledgement Details

Access the Acknowledgement Purchase Orders-Acknowledgement Details page by clicking a purchase order line number.



Acknowledgement Purchase Orders-Acknowledgement Details page

Change Order Click the Change Order link to access more detail about changes to schedules. This shows the details of what changes were made from the last time this PO was dispatched. For example, if this PO is on change order 3, it shows the changes made from change order 2 to change order 3.

Change Order check box The system displays the check box if there is a change order for this schedule. To view these changes, you must click the change order link described above. This is a visual indicator to help identify which schedules were modified from the last dispatch.

Acknowledge Due Date and Quantity The system provides these fields as a default to the Purchase Order. Suppliers can modify Due Date, Quantity, and other values for the line/schedule to indicate a change.

Split Line Click to split the schedule if the scheduled quantity is to be backordered between two or more dates. After clicking the split line button adjust the quantities between the original and new line, and add a new acknowledge due date for the new schedules quantity.

Comments Click the Comments button for each schedule that includes Ship To comments or attachments to view the comments. The comments and attachments are specific to each shipto location, so if all lines and schedules have the same ship to address, all the ship to comments and attachments will be the same.

Reviewing and Approving Online PO Acknowledgements

Once your supplier has created an online POA, your buyer can review the information, and accept, reject, or change the acknowledgement.

In this section, we discuss how your employees:

- Search for supplier-entered POAs.
- Maintain supplier-entered POAs.

Employee-Facing Pages Used to Maintain Online PO Acknowledgements

Page Name	Object Name	Navigation	Usage
Manage PO Acknowledgements	PO_SS_POA_SEARCH	Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements	Buyers can search for online POAs and POAs received using EDX. See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements.
Manage PO Acknowledgements - Acknowledgement Summary	PO_SS_POA_SUMMARY	Click a linked PO number on the Manage PO Acknowledgements search page.	Use to view the acknowledgement history for the selected PO.
Manage PO Acknowledgements - Acknowledgement Details	PO_SS_POA	Click a linked PO line on the Manage PO Acknowledgements - Acknowledgement Summary page.	Review and approve supplier-entered POAs.

Searching for Online POAs

Access the Manage PO Acknowledgements page.

This page essentially duplicates the supplier-facing Purchase Order Acknowledgement - Search/Filter Acknowledgements page, with these exceptions:

Vendor Set ID, Vendor ID The buyer can search for a vendor within a specific setID.

View Current Acknowledgements The buyer can only search for supplier responded or buyer accepted POAs. They can not see any new or in-process POAs with a status of *Supplier Review*.

Processed Indicates whether the (changed) POA has been included in a Load Change Request process run.

See Also

Chapter 4, "Acknowledging Purchase Orders Online," Searching for PO Acknowledgements, page 27

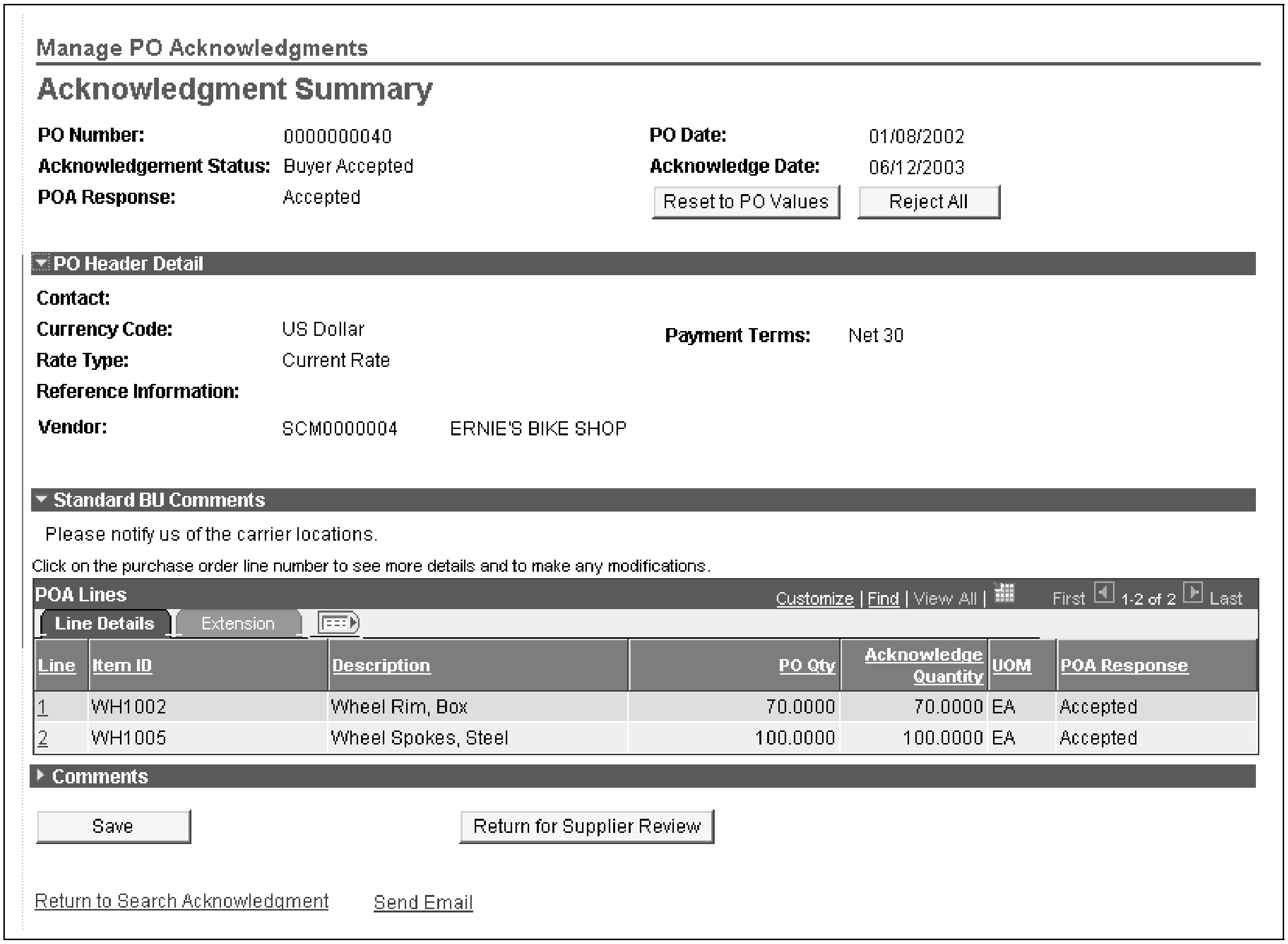
Reviewing and Approving Online POAs

Once the supplier submits a POA online, the buyer can access this page to review information such as acknowledged dates and quantities for the given purchase order. From here your buyers can:

- Review overall POA response at the header level.
- Review any line level exceptions.
- Modify and react to them accordingly within this page, which includes changing the POA information or sending the POA back to the supplier for further review.
- Approve the POA so that it can be passed to the Change Purchase Order process (PO_POCHNG) and update the PO. If using workflow, this action also marks the entry as worked in the worklist for the buyer associated to the PO.

See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Orders Online," Reviewing Acknowledgement Header Information.

Access the Manage PO Acknowledgements - Acknowledgement Summary page for Online POAs.



Manage PO Acknowledgements - Acknowledgement Summary page

The fields on this page essentially duplicate those on the supplier-facing Acknowledge Purchase Orders - Acknowledgement Details page, although your suppliers always access this page in "create" mode, while your employees are limited to "review, modify, and approve" mode.

See Chapter 4, "Acknowledging Purchase Orders Online," Creating Online PO Acknowledgements, page 26.

Note. POAs that are created by way of EDX are visible in the summary results but not visible within this collaborative POA page

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See *PeopleSoft Purchasing 8.8 PeopleBook*, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements.

Reset to PO Values	Reverts the POA to the values submitted on the original PO.
Save	Saves any changes; acknowledgement status remains as *Supplier Responded or Buyer Accepted.*
Save & Approve	Saves any changes and sets the acknowledgement status to *Buyer Accepted.* This enables the POA to be processed by the PO Load Change Request process. This also marks any worklist entry as worked for the buyer associated to the PO, if workflow is enabled.

Return for Supplier Review Routes the POA back to the supplier. Acknowledgement status is changed to *Supplier Review.* Buyer can include comments for the supplier, which the supplier can review as part of an iterative review and acknowledgement process on the supply side.

CHAPTER 5

Creating Advanced Shipping Notices

This chapter provides an overview of supplier advanced shipping notices (ASNs) and discusses how to:

- Create supplier ASNs.
- Review ASN history by suppliers.
- Review ASN history by employees.

Understanding Supplier ASNs

In most PeopleSoft documentation, *ASN* refers to internal PeopleSoft system users sending notification of shipment to an external party, and *advance shipping receipt (ASR)* refers to internal PeopleSoft users receiving or entering information that is derived from an external source.

In PeopleSoft eSupplier Connection, ASN refers to the shipment notification that helps your internal users in the receiving process, and that the supplier enters directly into the PeopleSoft system. Suppliers can use the Recent ASNs (recent advanced shipment notifications) pagelet to enables suppliers to navigate to shipment and receipt line information as well as create ASNs from your extranet homepage.

Supplier ASNs Are Created Against Your Purchase Orders

Suppliers view the lines and schedules for one or more purchase orders (POs), select specific records, and create ASNs that communicates shipment number, bill of lading, Pro number, Invoice number, carrier ID, expected arrival date, and carrier information. For evaluated receipt settlement related invoices (ERS) the Invoice information entered by the supplier is required and utilized for payment processing. Online ASNs also include line information such as item, revision, lot, serial, quantity shipped, and related supplier (sales) order numbers.

When suppliers perform searches for available PO schedules, the system returns all dispatched PO lines with an *Active* status that are not included in:

- Direct (drop) shipment POs.
- Flow-based kanban POs.

Once Supplier ASNs Are Submitted

When suppliers submits their ASNs, they are treated internally (and referred to in the PeopleSoft Purchasing documentation) as ASRs. Upon submission, the system:

- Assigns an enterprise integration point (EIP) control ID.
- Populates the EC staging tables:
  - RECV_ASHD_EC (ASN header table).

  - RECV_AOHD_EC (ASN Inventory header table).
  - RECV_AOLN_EC (ASN Inventory order line table).
  - RECV_AOLS_EC (ASN Inventory order lot serial table).
- Treats the advance shipment information, during Receive Load processing, as if it were an ASR that the system received electronically by EDX using the ASR EIP.

Note. Your suppliers cannot change or cancel ASNs once they submit the ASNs. However, your employees can maintain them using the ASR Review component in PeopleSoft Purchasing. Your employees can also use the ASN History component to search for supplier ASNs using a variety of search criteria.

See Also

Chapter 8, "Using PeopleSoft eSupplier Connection Pagelets ," page 75

PeopleSoft Purchasing 8.8 PeopleBook, "Receiving Shipments," Using Advanced Shipment Receipts

PeopleSoft Purchasing 8.8 PeopleBook, "Receiving Shipments," Loading Receipts Received Using Enterprise Integration Points and Electronic Data Collection

Creating Supplier ASNs

This section discusses how to create supplier ASNs.

Pages Used to Create Supplier ASNs

Page Name	Object Name	Navigation	Usage
Advance Shipment Notification - Select Vendor	PO_SS_VND_LIST	Manage Orders, Create ASNs	Suppliers select a vendor to navigate to its ASN creation pages. This page is available only if more than one vendor is associated with the user, and if the user uses the menu to log on.
Advance Shipment Notification - Advance Shipment Creation	PO_SSASN_CREATION	Manage Orders, Create ASNs Click the Create ASNs link on the Recent ASNs pagelet.	Create supplier ASNs.
Advance Shipment Notification - Purchase Order Schedule Selection	PO_SSASN_SHIPMENTS	Enter a shipment number on the Advance Shipment Creation page, and click the Add Lines button.	Select PO lines and schedules for ASNs.
Advance Shipment Notification - Lot/Serial Information (inquiry)	PO_SSASN_LOTSERIAL	Select a lot- or serial-controlled item, and click the Lot/Serial link on the Advance Shipment Creation page.	Assign lot IDs or serial IDs to selected item IDs.

Creating Supplier ASNs

Access the Advance Shipment Creation page.

To create an online ASN:

1. Enter the ASN header information including any defaults (such as order number) which will be applied to all ASN lines as they are added.

   The shipment number is required.

2. Click Add Lines to access the Purchase Order Schedule Selection page and search for the appropriate (dispatched) PO lines to include in the ASN.

   a. Enter a vendor location if the vendor is associated to more than one (if not, the location appears by default), purchase order number, and an item ID or vendor item ID; and optionally change the default date range to further control the search. Select the Exclude Received Schedulescheck box to prevent previously received schedules from being included in the search.

      To ease data entry on the supplier side, you can enter a date range and item number to identify which POs are awaiting shipment for the item.

   b. Click Search.

      The system returns all PO lines and schedules that meet the search criteria and are available to be shipped. If the page was already populated with data from a different PO, the system doesn’t refresh the page until you click this button.

3. Select one ore more resulting PO Schedule lines to indicate the line is to included with the ASN.

Note. You can select a PO schedule for inclusion more than once, but the system adds it only once to the ASN. Also, the from and to dates narrow down the expected shipment based on scheduled due date on the purchase order schedule lines.

4. Add the selected PO schedule to the ASN:

   a. Click Include in ASN (include in advance shipment notice) to clear the search results, transfer the selected PO lines to the Advance Shipment Creation page, and remain on the Purchase Order Schedule Selection page to perform another search and add more lines to the ASN.

   b. Click Include/View ASN (include and return to advance shipment notice) to access and transfer the selected PO lines to the Advance Shipment Creation page (or return to the page without selecting more lines).

5. Now that the Advance Shipment Creation page is now populated with current information for the selected schedules:

   a. You can modify the shipment line number, revision, shipped quantity, ship unit of measure (UOM), invoice ID, bill of lading, pro number, and vendor sales order number.

      Note. The Shipped quantity field displays *outstanding* quantities-the quantity ordered minus any previous receipts for the purchase order schedule-in the vendor UOM.

      If the ERS Action on the PO Matching page is set to Yes, the system requires an invoice ID form the supplier.

   b. The supplier can associate lot or serial numbers to lot- or serial-controlled items by selecting the radio button on the appropriate line and clicking the Lot/Serial link to access the Lot/Serial Information page.

      Enter the lot or serial ID for the selected item and click Return to return to the Advance Shipment Creation page.

6. Click Submit ASN (submit advanced shipping notice) to create the ASN.

   The system saves the ASN data to the EC staging tables and, from this point on, processes the data as if it were an ASR that was entered using the ASR EIP.

   See Chapter 5, “Creating Advanced Shipping Notices,” Understanding Supplier ASNs, page 35.

7. To send an email containing a URL to the ASN, click ASN History to access the ASN History component.

   Note. The Send Email link is located on the ASN History - Summary and Line Details pages; the ad hoc email function automatically generates a URL to the page from which it is generated.

Reviewing ASN History by Suppliers

This section lists the pages used to review ASN history by suppliers.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, “Receiving Shipments,” Using Advanced Shipment Receipts

Pages Used to Review ASN History by Suppliers

Page Name	Object Name	Navigation	Usage
ASN History - Select Vendor	PO_SS_ASN_VND_LIST	Manage Orders, View ASN History	Suppliers select a vendor to navigate to its ASN inquiry pages. This page is available only if more than one vendor is associated with the user.
ASN History - Filter Options	PO_SSASN_HIST_SRCH	Manage Orders, View ASN History Click the ASN History link on the Advance Shipment Creation page. If you are utilizing the Recent ASNs pagelet your suppliers can click the Show all/Enhanced link within the Recent ASNs pagelet to review ASNs.	Suppliers search for specific ASNs.
ASN History - Summary	PO_SSASN_HDRHIST	Suppliers who are using menu navigation select a vendor (if necessary), enter search criteria, and click the Search button on the ASN History - Filter Options page.	Suppliers and employees view purchase order and shipment information for supplier ASNs.
ASN History - Line Details	PO_SSASN_LNHIST	Click a shipment number on the ASN History - Summary page. If you are utilizing the Recent ASNs pagelet, your suppliers can click a shipment number to view shipment details.	Suppliers and employees view line details for selected shipments.
Advance Shipment Notification - Lot/Serial Information (inquiry)	PO_SSASN_LOTSERIAL	Click a shipment quantity on the ASN History - Line Details page.	View lot or serial information for selected items.
Email Message	WV_PE_EMAIL_SP	Click Send Email on the ASN History - Summary or ASN History - Line Details page.	Suppliers can send an email to a supplier or an internal PeopleSoft user regarding the ASN. The email includes links that take the recipient to the page from which the email was sent.

Reviewing ASN History by Employees

This section lists pages used to review ASN history by employees.

See Also

PeopleSoft Purchasing 8.8 PeopleBook, "Receiving Shipments," Using Advanced Shipment Receipts

Pages Used to Review ASN History by Employees

Page Name	Object Name	Navigation	Usage
ASN History - Filter Options	PO_SSASN_HISE_SRCH	Purchasing, Shipments, ASN History	Employees search for supplier ASNs.
ASN History - Summary	PO_SSASN_HDRHIST	From the Purchasing menu, click the Search button on the ASN History - Filter Options page.	View purchase order and shipment information for the supplier ASN. Suppliers also use this page.
ASN History - Line Details	PO_SSASN_LNHIST	Click a shipment number on the ASN History - Summary page.	View line details for selected shipments. Suppliers also use this page.
Advance Shipment Notification - Lot/Serial Information (inquiry)	PO_SSASN_LOTSERIAL	Click a shipment quantity on the ASN History - Line Details page.	View lot or serial information for selected items.
Email Message	WV_PE_EMAIL_SP	Click the Send Email link on the ASN History - Summary or ASN History - Line Details page.	Employees can send an email to a supplier or an internal PeopleSoft user regarding the ASN. This email includes links that take the recipient to the page from which the email was sent.

CHAPTER 6

Reviewing Supplier Account Activity

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

- Review POs.
- Review order summaries.
- Review receipts.
- Review invoices.
- Review payments.
- Review account balances.

Understanding Supplier Account Activity

Review activity transactions permit your accounts payable employees to spend their time more efficiently by enabling your suppliers to answer their own questions about existing invoices, purchase orders (POs), receipts, payments, and account balances.

Common Element Used in This Chapter

Item ID	Displays the vendor item identifier, if defined for the selected vendor-item combination on the Purchasing Attributes - Item Vendor page. If no vendor-item information exists, then your item ID appears.

Setting up Supply Side Print Capability

For users created prior to release 8.8, you may need to set up security so that suppliers can use the print functionality with PeopleSoft eSupplier Connection. You need to:

- Edit the permission list supplied to all external Supplier users to enable permission for supply side print. (If you are using the EPSS8000 permission list delivered (recommended), then you will not need to do this step as the permission list will already be modified.)

- Edit any existing Supplier Portal User profiles you wish to add the PO Print capability by using the PeopleTools User Profile component to .

Pages used to Set up Print Capability

Page Name	Object Name	Navigation	Usage
Permission Lists-Process	ACL_GENERAL	PeopleTools, Security, Permissions & Roles, Permission Lists. Select the Process tab.	Set the attributes and system defaults.
Permission Lists-Permission	ACL_PROCESS_GROUPS	PeopleTools, Security, Permissions & Roles, Permission Lists Click the Process Group Permissions link on the Permission List-Process page.	Specify to what capacity a user, or Role, can modify certain Process Scheduler settings.
User Profile	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles	Set general user profile attributes
Configure External Access	PO_SUPP_SETUP	Set Up Financials/Supply Chain, Common Definitions, Suppliers, Configure External Access	Make the View PDF/Print option available to suppliers and indicate the default server.

Setting Up Security

Access the Permission List-Process page. This step enables the supply side permission list to allow for printing POs. If you are using the delivered permission list EPSS8000, then this step will already be done for you.

1. Enter permission list that is equivalent to the *EPSS8000-All user access,* permission list that you are using for suppliers and select the Process page.
2. Click the Process Group Permissions link on the Process page. Access the Permission List-Permission page.
3. Add *POALL* to the grid, and click OK. The POALL Process group is required on this page so that the supplier user has security to run the PO Print report.

   Note. This does not allow suppliers to run other internal buyer side PO processes.

4. Next access the User Profile page in PeopleTools for any existing supplier users added in prior releases for which you want to enable print capability. If the Process Profile field is blank, enter the permission list you modified-*EPSS8000*-in the Process Profile and Primary Permission Lists fields. Click Save.

   Note. For any external users already created in the system, you must edit the user profile if you want them to have print capability. This will be done automatically for any new external user as long as they are created using the Distributed Vendor User pages. If you aren't already using the delivered permission lists, you only need to make sure there is a permission list called *EPSS8000* defined in the system. It can be an empty permission list, but it does need to exist to enable Distributed Vendor User pages to enable printing automatically for new users.

Configuring External Access

To establish external access for your suppliers, use the Configure External Access component.

Access the Configure External Access page.

Allow Supplier access to launch/print PO report

Select to allow suppliers to view and print POs.

Print Options

Options include creating the report *via REN Server* or *via Report Repository*.

If you are using REN server capability, the system displays a separate window to monitor the report status when the supplier clicks the button to print the PO, enabling your supplier to go on to other transactions. When the report is ready, the system displays it in a separate window.

If you are using the Report Repository, the system initiates the print process immediately when the supplier clicks the button to print the PO. If the print process takes more than several seconds, the system generates a message that they can continue within the same transaction and return to the button later when the report is completed.

Note. If you are using REN server capability, you must set up a REN server that users outside your firewall can access. The Report Repository requires less setup. We recommend trying the Report Repository method first and migrating to REN server technology if needed.

Reviewing POs

This section discusses how suppliers can review dispatched purchase orders and take action on them using Purchase Orders Component.

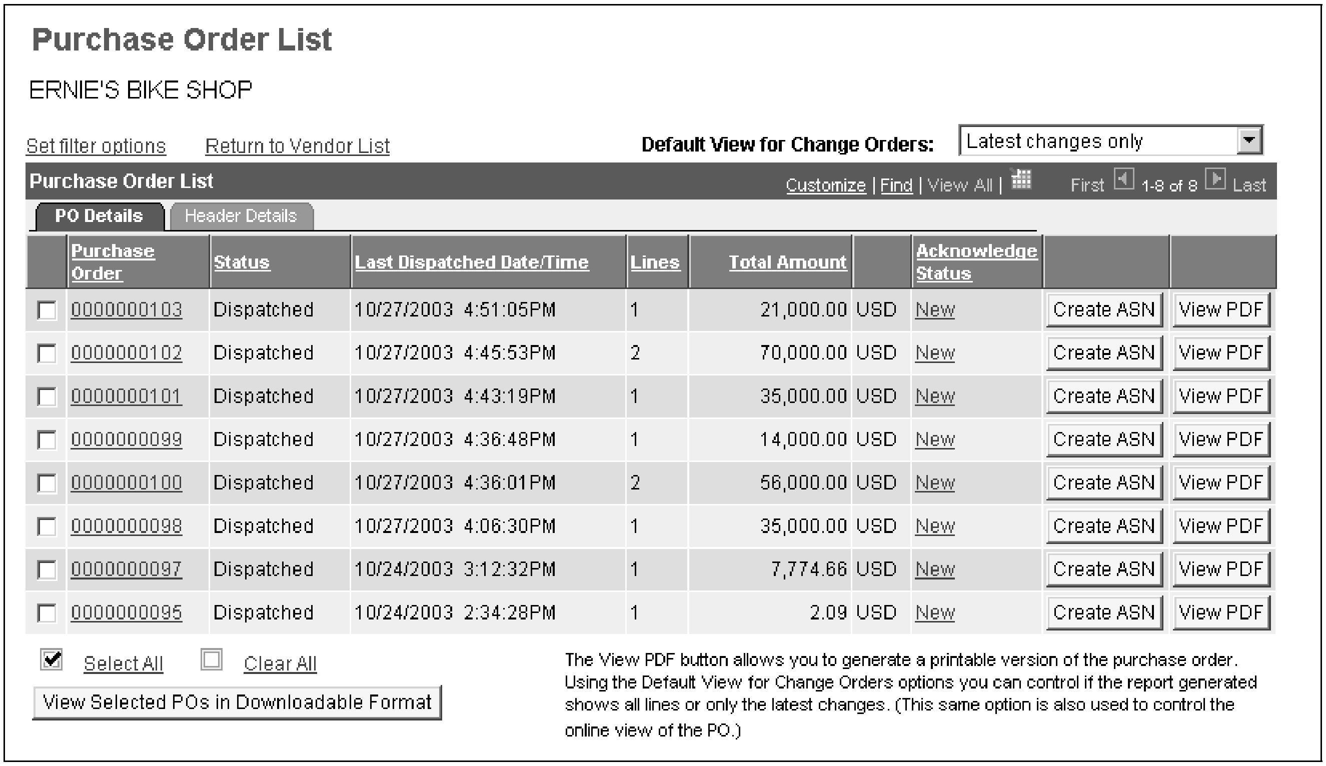
Pages Used to Review POs

Page Name	Object Name	Navigation	Usage
Purchase Orders - Select Vendor	PO_SS_VND_LIST	Manage Orders, Purchase Orders	Suppliers select a vendor to navigate to its PO inquiry pages. This page is available only if more than one vendor is associated with the user.
Purchase Orders - Filter Options	PO_SSSRCH_POS	Manage Orders, View Purchase Orders Optionally select a vendor on the Review Purchase Orders - Select Vendor page.	Search for POs.
Purchase Orders - Purchase Order List	PO_SSPOLST	Enter selection criteria and click the Search button on the Review Purchase Orders - Filter Options page.	View general PO information and select from the list of available POs for greater detail.

Page Name	Object Name	Navigation	Usage
Purchase Orders - Download Purchase Orders	PO_SSPO_DOWNLOAD	Click the View Selected POs in Downloadable Format button on the Purchase Order List page.	Use to determine which columns you want to include when downloading purchase order information to an excel spreadsheet.
Purchase Orders - Purchase Order Details	PO_SSPO_DETAILS	Click a PO number link on the Purchase Order List page. Click a PO ID link on the Recent Purchase Orders pagelet.	Review line item details and access invoices that are related to a selected PO.
Purchase Orders - Purchase Order History	PO_SS_POHIST_SP	Click the View PO Change History link on the Purchase Order Details page.	View the revision history for the purchase order. This will take you to another page that displays a listing of all the Purchase Order change history and will allow you to drill into previous purchase orders to see past changes.
PO Changes - Details	PO_SSPOLNCHG_SP	Click the View Changes link on the Purchase Order History page or the View PO Changes link for the changed order lines on the Purchase Order Details page.	View the line and schedule changes for a purchase order change order.
Purchase Orders - Line Comments	PO_SS_LNCOMM_SP	Click the Comments button on the Purchase Order Details page.	Review line comments or attachments for a selected purchase order line.
Purchase Orders - Purchase Order Schedule	PO_SSPO_SCHEDULE	Click a line number link on the Review Purchase Orders - Purchase Order Details page.	Review PO schedule details and drill into receipt line information. This page is a duplicate of the Review Invoices - Purchase Order Schedule page.
Purchase Orders - Receipt Lines	PO_SSRECV_LINES	Click the due date link on the Purchase Order Schedule page.	View lines received against the purchase order schedule.
Purchase Orders - Ship to Comments	PO_SS_SHIPCOMM_SP	Click the Comments button for a selected purchase order schedule on the Purchase Order Schedule page.	Review Ship To comments or attachments for a selected purchase order schedule.
Purchase Orders - Invoice Details	PO_SSINVC_LINES	Click an invoice number link on the Review Purchase Orders - Purchase Order Details page.	This page is a duplicate of the Review Invoices - Invoice Details page.

Using the Purchase Order List

Access the Review Purchase Orders-Purchase Order List page. Use this page to move between various supplier activities related to purchase orders including inquiry, printing, downloading, acknowledgements, and entering advanced shipment notifications.



Purchase Orders - Purchase Order List page

Default View for Change Orders	If your purchase order list includes a PO with a change order, you can view *All lines* or *Latest changes only* when you view PO details for a PO. When viewing or printing a purchase order in PDF format, *All lines* prints all lines on the PO, and *Latest changes only* prints only the changes on the report.
Lines	Equals the total number of lines on each PO. Supplier users can use this information to help evaluate and prioritize which POs need to be actioned first.
Total Amount	Equals the merchandise amount plus the adjusted amount for each PO.
Acknowledge Status	The text of this link indicates the current POA status. Click the linked status to create or access the purchase order acknowledgement for the selected purchase order. Each time a PO or change order for a PO is dispatched, the system changes its default status to New.
Create ASN	Click to access the Advanced Shipment Notification - Purchase Order Schedule Selection page to choose lines to create an advanced shipping notification. The system transfers the PO ID you selected to the ASN.
View ASN	Click to display any ASNs that are tied to the purchase order. This button only displays if ASNs exist for the purchase order.

View PDF	Click to initiate the PO report process, which runs in the background. You can then print the purchase order from the PDF. You must select the printing option on the Configure External Access page for suppliers to view and print PDFs.

Note. When REN Server method is not used for viewing the PDF and ten seconds has passed but the PDF has not opened, the system displays a message explaining that the process is taking longer, wait a few seconds and then press the button again. The system then checks to see if the report is finished and when it is, pulls the PDF up immediately

You must stay within the transaction or else pushing the button again will regenerate the report. You can navigate to other pages and look at other POs, and so forth, but leaving the transaction loses the “link” to the report.

When the REN Server method is used for viewing the PDF, a new window will open when the report has finished.

View Selected PDFs in Downloadable Format	For every row selected, the system displays the PO information in a grid that you can then use to download to an excel spreadsheet.

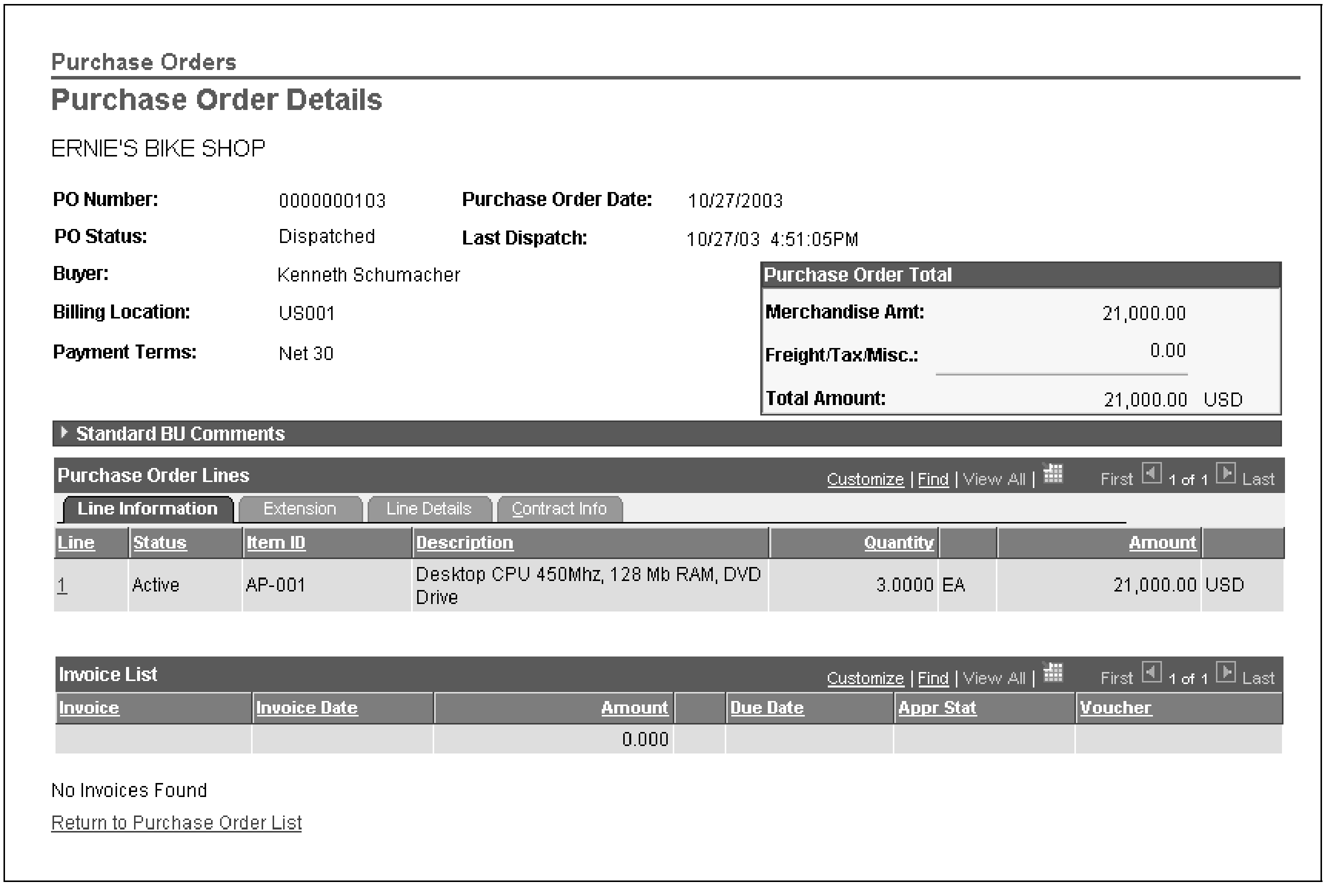
See Also

Chapter 6, “Reviewing Supplier Account Activity,” Configuring External Access, page 43

PeopleSoft Purchasing 8.8 PeopleBook, “Defining Purchasing Item Information,” Defining Purchasing Item Attributes

Reviewing PO Details

Access the Review Purchase Orders - Purchase Order Details page.


Purchase Orders

Purchase Order Details

ERNIE'S BIKE SHOP

PO Number:	0000000103	**Purchase Order Date:**	10/27/2003
PO Status:	Dispatched	**Last Dispatch:**	10/27/03 4:51:05PM
Buyer:	Kenneth Schumacher		
Billing Location:	US001		
Payment Terms:	Net 30		

Purchase Order Total

Merchandise Amt:	21,000.00	
Freight/Tax/Misc.:	0.00	
Total Amount:	21,000.00	USD

Standard BU Comments

Purchase Order Lines — Customize | Find | View All | First 1 of 1 Last

Line Information | Extension | Line Details | Contract Info

Line	Status	Item ID	Description	Quantity		Amount	
1	Active	AP-001	Desktop CPU 450Mhz, 128 Mb RAM, DVD Drive	3.0000	EA	21,000.00	USD

Invoice List — Customize | Find | View All | First 1 of 1 Last

Invoice	Invoice Date	Amount		Due Date	Appr Stat	Voucher
		0.000				

No Invoices Found

Return to Purchase Order List

Purchase Order Details page

The system displays PO line item details.

View PO Change History This link shows the history of initial dispatch any subsequent change order dispatch information for the purchase order

View If your purchase order list includes a PO with a change order, you can view *All lines* or *Latest changes only* when you view PO details for a PO. The system provides the value selected on the Purchase Order List page as a default.

Purchase Order Total Includes the merchandise amount totalled for each line added to any freight, tax, and any miscellaneous charges. This excludes any canceled lines.

Purchase Order Lines

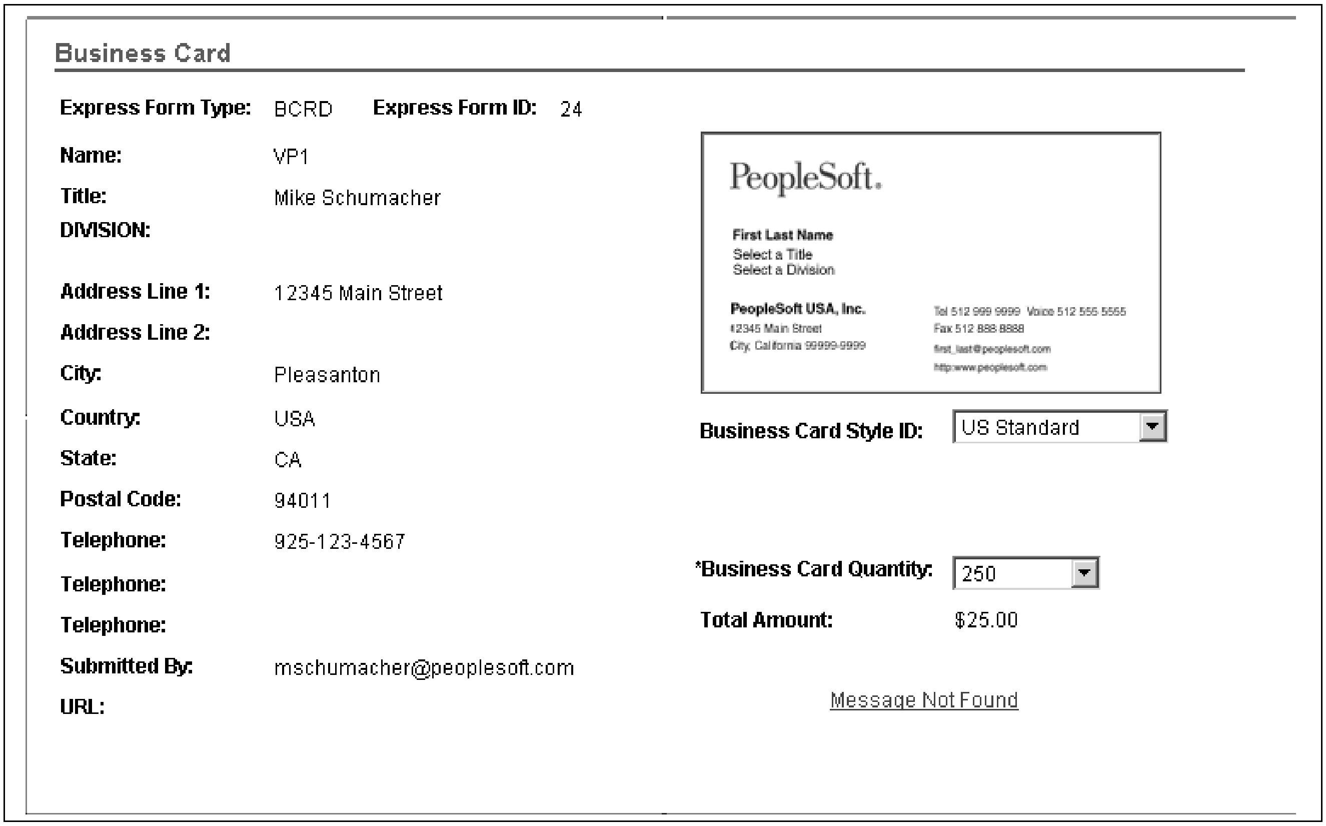
Line Click a line link to access the Purchase Order Schedule page, which displays schedule details for the line item.

Status Values are *Active*, *Closed*, *Hold*, and *Canceled.* (Approved POs do not appear.)


Click to access the Line Comments/Attachments page.

Express Forms

If the Purchase Order line was sourced from a PeopleSoft eProcurement Requisition Express Form item, the system displays a button to display the Express Form information pertaining to the line.

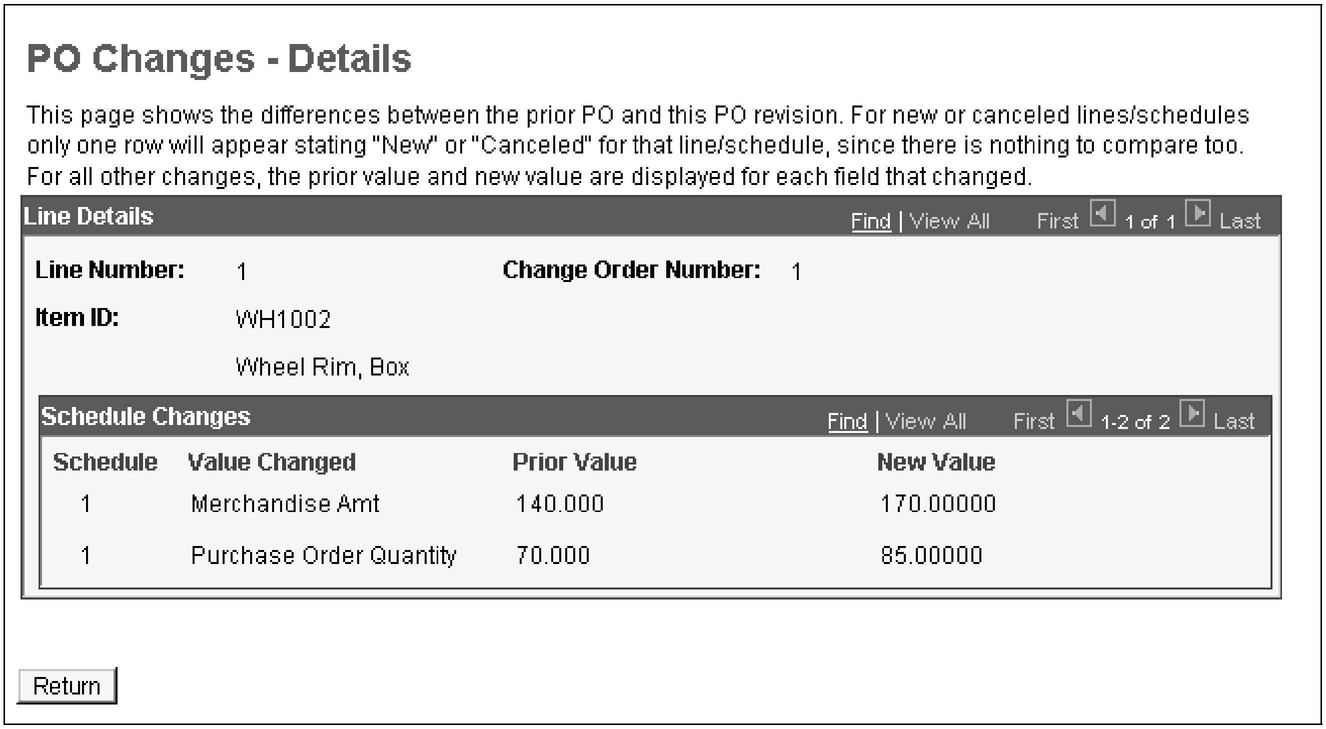


Express Form page

See *PeopleSoft eProcurement 8.8 PeopleBook*, “Using Special Requests and Express Forms to Create Requisitions”.

Change Orders

Change Order When change orders are present for the line item click here to access the PO Changes - Details to see the change order information pertaining to the line.



PO Changes - Details

This page shows the differences between the prior PO and this PO revision. For new or canceled lines/schedules only one row will appear stating "New" or "Canceled" for that line/schedule, since there is nothing to compare too. For all other changes, the prior value and new value are displayed for each field that changed.

Line Details Find | View All First 1 of 1 Last

Line Number: 1 **Change Order Number:** 1

Item ID: WH1002

Wheel Rim, Box

Schedule Changes Find | View All First 1-2 of 2 Last

Schedule	Value Changed	Prior Value	New Value
1	Merchandise Amt	140.000	170.00000
1	Purchase Order Quantity	70.000	85.00000

Return

PO Changes - Details page

Invoice List

Invoice Click an invoice link to access the Invoice Details page.

See Also

Chapter 6, “Reviewing Supplier Account Activity,” Reviewing Invoices, page 52

Reviewing Order Summaries

This section discusses how to:

- View schedule information.
- View change order information.

Pages Used to Review Order Summaries

Page Name	Object Name	Navigation	Usage
View Order Summary - Select Vendor	PO_SS_VND_LIST	Manage Orders, View Order Summary	Suppliers select a vendor to navigate to its order summary inquiry pages. This page is available only if more than one vendor is associated with the user.
View Order Summary - Filter Options	PO_SSSRCH_SCHEDULE	Manage Orders, View Order Summary Optionally select a vendor on the View Order Summary - Select Vendor page.	Search for orders based on PO search criteria. **Note.** Leaving all criteria fields blank results in no returned orders.
View Order Summary - Order Schedule	PO_SSSUPP_SCHED	Enter selection criteria and click the Search button on the View Order Summary - Filter Options page.	Review existing PO schedules, change orders, and planned POs. To view planned POs, you must have PeopleSoft Supply Planning installed, and you must have run the Receive Planning Messages process.
View Order Summary - Shipping Address	PO_SSSHIPTO_ADDR	Click a ship to link on the View Order Summary - Order Schedule page.	Review ship to addresses for a PO schedule.
View Order Summary - Change Order Details page	PO_SSSUPP_SCH_CHOR	Click a change order link on the View Order Summary - Order Schedule page.	Review any change order details.

Viewing Schedule Information

Access the View Order Summary - Order Schedule page.

The system displays details for the order line’s selected schedule. In particular:

Type

PO: Existing PO.

Plan: Planned PO.

Status

Planned PO: *Approved* or *Not Approved.*

Existing PO: *Initial, Open, Approved, Pending Approval, Canceled, Complete,* or *Dispatched.*

Ship To

Click a value to access the Shipping Address page, which displays shipping address details.

Change Order

Click a value to access the Change Order Details page, which displays details of any applicable change orders. If a change order is suggested by planning, either the PO schedule can be canceled, or its due date can be changed. This link does not appear if there are no change orders.

Viewing Change Order Information

Access the View Order Summary - Change Order Details page.

The system displays details for the changed order.

Change Type Values are *Change, Hold, Inserted,* and *Canceled.*

Source The source planning system.

Reviewing Receipts

This section discusses how to review receipt details.

Pages Used to Review Receipts

Page Name	Object Name	Navigation	Usage
Review Receipts - Select Vendor	PO_SS_VND_LIST	Manage Orders, View Receipts	Suppliers select a vendor to navigate to its receipt inquiry pages. This page is available only if more than one vendor is associated with the user.
Review Receipts - Filter Options	PO_SSSRCH_RECEIPTS	Manage Orders, View Receipts Optionally select a vendor on the Review Receipts - Select Vendor page.	Search for vendor receipts.
Review Receipts - Receipt Lines	PO_SSRECVLST	Enter selection criteria and click the Search button on the Review Receipts - Filter Options page.	Review receipt information and access receipt line details.
Review Receipts - Receipt Details	PO_SSRECV_DETAILS	Click a receiver ID link on the Review Receipts - Receipt Lines page.	Review receipt line details.

Reviewing Receipt Details

Access the Review Receipts - Receipt Details page.

The system displays details for the selected receipt.

Receipt Status Values are *Fully Received, Canceled, Closed Receipt, Fully Received, Hold Receipt, Moved to Destination, Open, PO Not Received* (purchase order not received), or *PO Partially Received* (purchase order partially received).

Net Receipt Quantity Net shipment quantity that was received (determined by the quantity received minus the quantity rejected minus the quantity returned).

Reviewing Invoices

This section discusses how to:

- Review invoice details.
- Review receipt line information.

Pages Used to Review Invoices

Page Name	Object Name	Navigation	Usage
Review Invoices - Select Vendor	PO_SS_VND_LIST	Review Payment Information, Invoices	Suppliers select a vendor to navigate to its invoice inquiry pages. This page is available only if more than one vendor is associated with the user.
Review Invoices - Filter Options	PO_SSSRCH_INVOICES	Review Payment Information, Invoices Optionally select a vendor on the Review Invoices - Select Vendor page.	Search for vendor invoices.
Review Invoices - Invoice List	PO_SSREV_INVOICES	Enter selection criteria and click the Search button on the Review Invoices - Filter Options page.	Review general invoice information and access details for a specific invoice.
Review Invoices - Invoice Details	PO_SSINVC_DETAILS	Click an invoice number link on the Review Invoices - Invoice List page.	Review invoice details and access other detail pages.
Review Invoices - Payment Details	PO_SSPYMNT_DETAILS	Click a reference ID link on the Review Invoices - Invoice Details page.	This page is a duplicate of the Review Payments - Payment Details page. See Chapter 2, “Maintaining Vendor Information,” Self-Service Security for Vendors, page 4.
Review Invoices - Purchase Order Lines	PO_SSPO_LINES	Click a PO number link on the Review Invoices - Invoice Details page.	Review PO line details for the invoice and access other detail pages.
Review Invoices - Purchase Order Schedule	PO_SSPO_SCHEDULE	Click a line number link on the Review Invoices - Purchase Order Lines page.	Review schedule details for the selected line.
Review Invoices - Receipt Lines	PO_SSRECV_LINES	Click a received date link on the Review Invoices - Invoice Details page.	This page is a duplicate of the Review Purchase Orders - Receipt Lines page.
Review Invoices - Receipt Details	PO_SSRECV_DETAILS	Click a receiver ID link on the Review Invoices - Receipt Lines page.	This page is a duplicate of the Review Receipts - Receipt Details page. See Chapter 6, “Reviewing Supplier Account Activity,” Reviewing Receipt Details, page 51.

Reviewing Invoice Details

Access the Review Invoices - Invoice Details page.

The system displays details for the selected invoice.

Invoice Header Details

Payment Status Values are *To be Paid, Paid in Full,* or *Approved for Payment.*

Invoice Line Details

Static Amount Converted cost using a standard unit of measure (for example, rental cost per square foot) that is associated with a statistic code.

Payment Schedule

Status Payment selection status. Values are *Selected, Unselected, Paid, Canceled, Prepaid, Convert Error, Closed, Negative Voucher Sum,* or *In Process.*

Payments Made

Reference Click a value to access the Payment Details page, which displays additional payment information.

Purchase Orders

Purchase Order Click a value to access the Purchase Order Lines page, which displays item details.

Status Values are *Initial, Open, Complete, Canceled, Dispatched, Approved,* or *Pending Approval.*

Receipts

Received Date Click a value to access the Receipt Lines page, which displays additional receipt details.

Reviewing Receipt Line Information

Access the Review Invoices - Receipt Lines page.

The system displays details for the selected receipt line.

Status Values are *Fully received, Canceled, Closed Receipt, Fully Received, Hold Receipt, Moved to Destination, Open, PO Not Received,* and *PO Partially Received.*

Rej Reason (reject reason) *DAM* (damaged goods), *FAL* (failed inspection), *INC* (incomplete shipment), *LAT* (late shipment), *RLY* (early shipment), or *WRG* (wrong goods or services).

Reviewing Payments

This section discusses how to view payment details.

Pages Used to Review Payments

Page Name	Object Name	Navigation	Usage
Review Payments - Select Vendor	PO_SS_VND_LIST	Review Payment Information, Payments	Suppliers select a vendor to navigate to its payment inquiry pages. This page is available only if more than one vendor is associated with the user.
Review Payments - Filter Options	PO_SS_SEARCH	Review Payment Information, Payments Optionally select a vendor on the Review Payments - Select Vendor page.	Search for vendor payments.
Review Payments - Payments Made	PO_SSPYMNTLST	Enter selection criteria and click the Search button on the Review Payments - Filter Options page.	View a list of payment information that meets the search criteria and access details for a specific payment.
Review Payments - Payment Details	PO_SSPYMNT_DETAILS	Click a reference link on the Review Payments - Payments Made page.	Review payment details. This page is a duplicate of the Review Invoices - Payment Details page.

Viewing Payment Details

Access the Review Payments - Payment Details page.

The system displays details for the selected payment.

Method

Payment methods include:

ACH: Automated clearinghouse.

Direct DB: Direct debit.

Check System: Check.

Draft: Promissory payment issued by a supplier or customer.

EFT: Electronic funds transfer.

Manual: Manual check.

Wire: Wire report.

Pay Status

Values are *To be Paid, Paid in Full,* or *Approve for Payment.*

Reviewing Account Balances

This section discusses how to:

- View account balances by currency.
- View invoice account balance details.

Pages Used to Review Account Balances

Page Name	Object Name	Navigation	Usage
Account Balances - Select Vendor	PO_SS_VND_LIST	Review Payment Information, Account Balances	Suppliers select a vendor to navigate to its account balance inquiry pages. This page is available only if more than one vendor is associated with the user.
Account Balances - Balances by Currency	PO_SSVNDRBALST	This page appears only if the supplier has outstanding vouchers in different currencies. Otherwise, the Account Balances - Invoice List page appears.	View account balances, including the currency in which each balance is shown.
Account Balances - Invoice List	PO_SSVNDRBAL_DTL	Select a vendor on the Account Balances - Select Vendor page. Click a gross amount link on the Account Balances - Balances by Currency page.	Review general invoice account balance information and access details for a specific invoice.
Account Balances - Invoice Details	PO_SSINVC_LINES	Click an invoice number link on the Account Balances - Invoice List page. Click an invoice number link on the Purchase Order Details page.	Review account balance details.

Viewing Account Balances by Currency

Access the Account Balances - Balances by Currency page.

Gross Amount For all outstanding vouchers for the selected vendor. Click a gross amount link to access the Account Balances - Invoice List page, which displays the invoices that are included in the gross amount for this vendor and currency.

Viewing Invoice Account Balance Details

Access the Account Balances - Invoice Details page.

The vendor name and gross amount appear if you selected them on the Account Balances - Balance by Currency page. Otherwise, the vendor from the Account Balances - Select Vendor page appears.

The system displays detailed information for each invoice in the list.

Payment Schedule

Status Payment selection status. Values are *Selected, Unselected, Paid, Canceled, Prepaid, Convert Error, Closed, Negative Voucher Sum,* and *In Process.*

CHAPTER 7

Reviewing Supplier Performance

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

- Define supplier performance targets and tolerances
- View supplier performance metrics.

See Also

Chapter 8, "Using PeopleSoft eSupplier Connection Pagelets ," page 75

Understanding Supplier Performance Metrics

Supplier performance is crucial to your ongoing relationship with your suppliers. Problems (such as poor quality or late delivery) with supplier shipments can lead to additional expense, a breakdown in the relationship, and, ultimately, exclusion of the supplier.

You can provide your employees and, your suppliers) with ongoing performance measurements against various metrics and provide instant feedback (against predefined targets) if there are delivery or quality problems.

You can generate metrics to track a vendor's on-time, quantity, quality, and quantity ordered versus received performance.

Supplier Metric Access

Supplier performance metrics are available to your internal users as a regular PeopleSoft eSupplier Connection feature. Your suppliers can use the supplier performance pagelets to view these metrics for the vendors to whom they have access in a graphical display and navigate to the performance detail pages.

All users can navigate from one metric to another by changing their selections in the Metric field on any performance detail page, provided that their security settings allow access to all of the pages.

See Also

Chapter 8, "Using PeopleSoft eSupplier Connection Pagelets ," page 75

On-Time Metric

The On-Time metric tracks the percentage and actual number of vendor shipments that are on time, early, and late for all of the items within a period. You can base your measurements on one of two methods:

- The number of receipts in relation to the schedule date.

For example, if you expect one shipment of 100 pieces on February 15 but, instead, you receive the following, the calculation would reflect a 75 percent early metric:

1. Receiver ID 1, 10 items received on February 11.
2. Receiver ID 2, 10 items received on February 12.
3. Receiver ID 3, 10 items received on February 13.
4. Receiver ID 4, 70 items received on February 15.

- The aggregate receipt quantity in relation to the schedule date.

  Using the previous example, this calculation would reflect a 30 percent early metric.

See Also

Chapter 7, "Reviewing Supplier Performance," Defining Supplier Performance Targets and Tolerances, page 62

Chapter 7, "Reviewing Supplier Performance," Viewing On-Time Performance Details, page 67

Quantity Metric

The Quantity metric tracks the percentage and actual number of vendor shipments (receipts) with correct quantities, over-shipment quantities, and under-shipment quantities by period.

Using the previous example for on-time metrics, the calculation would reflect a 75 percent under metric (three of four receipts were less than the correct scheduled quantity).

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing Quantity Performance Details, page 70

Quantity Ordered Versus Received Metric

The PO/Received Quantity (purchase order/received quantity) metric tracks the percentage and actual quantity of the receipts against purchase order (PO) quantity by period.

Using the previous example, the calculation would reflect a 100 percent received metric (100 were scheduled, and 100 were received, regardless of the number of receipts).

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing PO Versus Receipt Performance, page 72

Quality Metric

The Quality metric tracks the percentage and actual number of vendor shipment quantities that are inspected, accepted, rejected, and returned by period.

The system calculates a percentage rejected and a percentage returned as part of the quality performance metric. This calculation uses only return-to-vendor records that have a receiver ID and ignores canceled receipts.

You can exempt (or include) certain receiving reject or return reason codes from the percentage of defectives that your supplier performance metrics reflect.

For example, you may not want to use incomplete shipments as a performance measurement for product quality. You can use the Return/Reject Reasons page to remove the Include in Quality Metric flag from that particular reason code.

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing Quality Performance Details, page 71

PeopleSoft Setting Up Procurement Options 8.8 PeopleBook, "Defining Procurement Options," Assigning Codes to Reject and Return Reasons

Prerequisites

Before the system can calculate performance metrics, you must:

1. Build a calendar using the Calendar Builder page in the Common Definitions menu.
2. Set up a procurement analysis reporting entity using the Define Procurement Controls page in the Analyze Procurement menu.

   In particular, you must:

   a. Select the Include Receiver Data and Include PO Data check boxes.

   b. Enter at least one receiving and one purchasing business unit.

   Note. Your business unit selections must include all of the business units that contain the data that you want your suppliers to view. The metrics that appear to suppliers are related only to the reporting entity that you attach to the PeopleSoft eSupplier Performance setup record.

3. Define system targets and tolerances for the reporting entity.
4. (Optional) Define vendor-specific targets and tolerances for the setID.
5. Run the Procurement History Update process (FS_PRCRUPD).

See Also

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "Defining Financials and Supply Chain Management Common Definitions"

PeopleSoft Purchasing 8.8 PeopleBook, "Analyzing Procurement History," Configuring Procurement Analysis Inquiries

PeopleSoft Purchasing 8.8 PeopleBook, "Analyzing Procurement History," Generating Procurement History

Defining Supplier Performance Targets and Tolerances

You can define how the system derives and displays supplier performance metrics by setting performance targets and tolerances.

This section discusses how to:

- Define system targets and tolerances.
- Define vendor-specific targets and tolerances.

Graph Colors

The target and tolerance percentages that you enter on the metrics setup pages determine certain performance graph bar colors. Values that are:

- Equal to or greater than the target percentage are green (acceptable).
- Less than the target percentage but greater than the target percentage minus the tolerance percentage are yellow (warning).
- Less than this difference between the target percentage and the tolerance percentage are red (unacceptable).

Performance graph bars can also represent *particular* metric values; for example, the percentage of early shipments is expressed in blue on the On-Time Performance graph.

We use a PeopleTools 2D Bar chart type.

See *PeopleTools 8.44 PeopleBook: PeopleCode Language Reference*

Metrics

The system displays metrics against a specific target and tolerance for a particular vendor within a reporting entity if you define targets and tolerances on the Supplier Performance Vendor page. Otherwise, the system uses the general system-level targets and tolerances, which you define on the Supplier Performance Setup page.

Periods

The data (percentages) that appear are an aggregation of the items and units of measure for which receipts have been made. For each period shown, the user must navigate to view the underlying data that supports the chart.

The number of periods that appear is determined at the system level. The periods that appear in the performance detail pages (and their associated supplier pagelets) are based on the date ranges that the calendar ID that is associated with the reporting entity ID in PeopleSoft Purchasing defines.

See *PeopleSoft Purchasing 8.8 PeopleBook*, “Analyzing Procurement History,” Defining Reporting Entities.

Pages Used to Define Performance Targets and Tolerances

Page Name	Object Name	Navigation	Usage
Supplier Performance Setup	WV_PE_METRIC_SETUP	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Setup	Define system targets and tolerances for the Purchasing reporting entity.
Supplier Performance Vendor	WV_PE_METRIC_VNDR	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Vendor	Define vendor-specific targets and tolerances for a setID.

Defining System Targets and Tolerances

To define system targets and tolerances, use the Supplier Performance Setup component.

Access the Supplier Performance Setup page.

To set up system targets and tolerances for the reporting entity:

1. Determine the reporting entity:

   Reporting Entity ID Select to establish system targets and tolerances for this reporting entity. Define reporting entities on the Define Procurement Controls page in PeopleSoft Purchasing.

   See *PeopleSoft Purchasing 8.8 PeopleBook,* “Analyzing Procurement History,” Defining Reporting Entities.

2. Establish performance targets and tolerances (these metrics are expressed in percentages):

   On-Time Performance Target The optimal percentage of on-time deliveries (quantity or receipts) for the given period.

   See Chapter 7, “Reviewing Supplier Performance,” Viewing On-Time Performance Details, page 67.

   Quantity Performance Target The optimal percentage of correct shipments in terms of quantity received versus scheduled quantity for the given period.

   See Chapter 7, “Reviewing Supplier Performance,” Viewing Quantity Performance Details, page 70.

   Quality Performance Target The optimal percentage of receipts that are received without being rejected due to quality for the given period.

   See Chapter 7, “Reviewing Supplier Performance,” Viewing Quality Performance Details, page 71.

PO/Receipt Qty Perf. Target (purchase order/receipt quantity performance target)
: The optimal percentage of ordered versus received quantities for the given period.

  See Chapter 7, “Reviewing Supplier Performance,” Viewing PO Versus Receipt Performance, page 72.

3. Set the chart and grid settings:

Number of Periods to Display
: The number of periods that you want to appear in the graphical charts. The calendar definition determines a period’s length.

Max Rows to Return (maximum rows to return)
: The maximum number of rows that the system retrieves when the supplier selects detail for a period. This limits how much data the system retrieves to conserve web server resources.

4. Select early and late metric display settings.

   You can calculate early and late metrics in one of two ways:

Early/Late Metrics by Receipts
: Bases the metric on the total number of receipts in relation to the schedule date. You may prefer this method when you want to measure timing of shipments regardless of quantity.

Early/Late Metrics by Quantity
: Bases the metric on the aggregated receipt quantity in relation to the schedule date. You may prefer this method when you typically have several receipts for a given PO schedule line (versus the metric based on receipt count only).

  See Chapter 7, “Reviewing Supplier Performance,” Understanding Supplier Performance Metrics, page 59.

Defining Vendor-Specific Targets and Tolerances

To define vendor-specific targets and tolerances, use the Supplier Performance Vendor component.

Access the Supplier Performance Vendor page.

This page is nearly identical to the Supplier Performance Setup page with the exception that you are defining values for a specific vendor in a SetID rather than system-wide reporting entity values.

Viewing Supplier Performance Metrics

Your employees and your suppliers can access the supplier performance detail pages.

This section lists common elements and discusses how to:

- View on-time performance details.
- View quantity performance details.
- View quality performance details.
- View PO versus receipt performance.

Understanding Viewing Supplier Performance Metrics

The internal-facing versions of the supplier performance detail pages are identical to the external-facing versions, with one exception: internal-facing pages include a SetID field with which internal users can access all vendors that are associated with the setID. However, vendors who use the external-facing pages can access only the vendors to whom you have granted them access. Vendors don't have access to the internal-facing detail pages.

Common Elements Used in This Section

Metric

Select *On-Time Performance, Quality Performance, Quantity Over/Under Performance,* or *PO/Receipt Qty Performance* (purchase order/receipt quality performance). Available options depend on whether the user has security for the pages.

Vendor

This field appears when the user is associated with more than one vendor. Internal users can select a vendor that is associated with the setID. The system displays only setID-vendor combinations for which there is data in the PRCR_ITEM_HST table.

Period/Year

Click a value to append complete procurement analysis data to the page that you are viewing. This summarizes the metrics for the item ID during the period.

See Viewing On-Time Performance Details for an example.

The periods that appear are based on the date ranges that the calendar ID that is associated with the report ID in PeopleSoft Purchasing defines.

When you select a period or year on a performance page, the system appends performance detail information and redisplays the page with the following information, which you can filter using several criteria.

From Percentage/To Percentage displays all items where the on-time, quantity, or quality percentage falls in a specific percentage range. Initially, From Percentage is set to *0,* and To Percentage is set to the target percentage for the metric.

If the from and to criteria don't return any data, the system changes the To Percentage to 100, and the system displays the selection again so that at least one row is returned in the grid.

If the from and to criteria return more rows than the Max Rows setting allows, the system displays an error message prompting the user to modify the from and to percentages to reduce the number of returned rows.

Performance Detail

Once you refresh a performance detail page, the system redisplays the page and adds further detail for the selected period. In particular:

Item ID and **Vendor Item ID**

Click a value to access the Review Receipts - Receipt Lines page, which displays individual receipt line details.

Note. For the PO/Receipt metric, this link takes you to the Review Purchase Orders - Purchase Order List page; you can access the Receipt pages by drilling into the associated PO pages.

See Chapter 6, "Reviewing Supplier Account Activity," Reviewing Receipts, page 51.

Ship To The ship to business unit. Click a value to access the Ship To Details page.

Send Email Click to send an email that includes links that external and internal users can click to return to the specific pages that they were viewing.

Note. The web server must be configured for email.

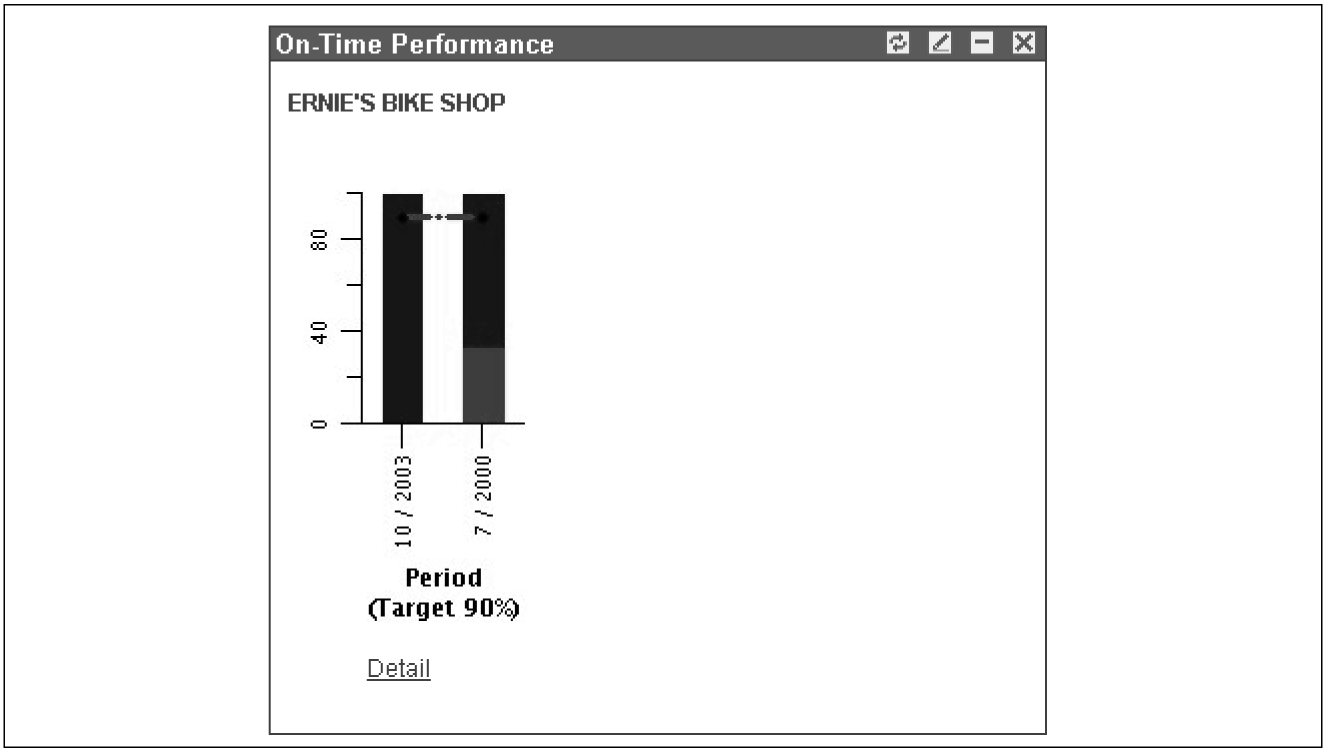
See Chapter 2, "Maintaining Vendor Information," Sending Email Messages, page 11.

Pages Used to View Supplier Performance Metrics

Page Name	Object Name	Navigation	Usage
View Vendor Shipment Performance - On-Time Performance	WV_PE_METRIC_DTL	Internal users: Purchasing, Analyze Procurement, Review Supplier Performance. Select a setID, the appropriate metric, and vendor. External users click the Detail link on the appropriate pagelet.	Track the percentage and actual number of shipments that are on time, early, and late for all items within the period.
View Vendor Shipment Performance - Quantity Performance	WV_PE_METRIC_DTL	See above.	Track the percentage and actual number of vendor shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.
View Vendor Shipment Performance - Quality Performance	WV_PE_METRIC_DTL	See above.	Track the percentage and actual number of vendor shipment quantities that are inspected, accepted, rejected, and returned by period.
View Vendor Shipment Performance - PO/Receipt Qty Performance	WV_PE_METRIC_DTL	See above.	Track the percentage and actual number of vendor shipment quantities that are inspected, accepted, rejected, and returned by period.
View Vendor Shipment Performance - Ship To Details	IN_SSQBALBUNIT_DET	Click a ship to business unit link on the Ship To/Category tab of any performance detail page.	View shipto details.
Email Message	WV_PE_EMAIL	Click the Send Email link on any performance detail page.	Send an email from within the detail page about the data that you or the supplier are reviewing.

Viewing On-Time Performance Details

Access the View Vendor Shipment Performance - On-Time Performance page.



Example of the View Vendor Shipment Performance - On-Time Performance page before clicking the Period/Year link

Detail Information for Period: 7 - 07/01/2000 thru 07/31/2000

From Percentage: 0.0000 **To Percentage:** 90.0000

Category: **Ship To:** Refresh

Performance Detail Customize | Find | View All | First 1-4 of 4 Last

Percentages | Actuals | Ship To/Category | Other Info

Item ID	Description	% On Time	% Early	% Late
VNDR000001	Patch Kit	0.00	100.00	0.00
WHEEL	Wheel Tire, 700x23	0.00	100.00	0.00
MT3000	Mountain Bike, Woman's	50.00	50.00	0.00
MT3000	Mountain Bike, Woman's	50.00	50.00	0.00

Send Email

Example of the appended Detail Information section after clicking the Period/Year link

The system displays on-time performance summary information. This table displays the equations that the system uses to derive this page's metric fields:

Metric Name	Equation Used to Derive Metric
% On Time	Depending on the early/late metric display setting that you select, the number of receipts minus early ships minus late ships divided by: The total number of receipts. The total receipt quantity.
% Early	Depending on the early/late metric display setting that you select, the early ships divided by: The total number of receipts. The total receipt quantity.
% Late	Depending on the early/late metric display setting that you select, the late ships divided by: The total number of receipts. The total receipt quantity.
	These columns appear when you select Early/Late Metrics by Receipts when setting system-wide or vendor-specific targets and tolerances:
Number of Receipts	Total number of receipts for a specific item and vendor for a period (includes all items).
Early Ships	Number of receipts (by period) that are marked as received early. **Note.** A receipt is marked *early* when the receipt date from the receipt header is less than the due date from the PO schedule, minus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value *2*.
Late Ships	Number of receipts (by period) that are marked as received late. **Note.** A receipt is marked *late* when the receipt date from the receipt header is greater than the due date from the PO schedule, plus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value *3*.

Metric Name	Equation Used to Derive Metric
	These columns appear when you select Early/Late Metrics by Quantity when setting system-wide or vendor-specific targets and tolerances:
Receipt Quantity	Total quantity received for a specific item and vendor for a period (includes all items).
Qty Early	Quantity received (by period) that is marked as received early. **Note.** A receipt is marked *early* when the receipt date from the receipt header is less than the due date from the PO schedule, minus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_ SHIP.SHIP_DATE_STATUS field with the value *2*.
Qty Late	Quantity received (by period) that is marked as received late. **Note.** A receipt is marked *late* when the receipt date from the receipt header is greater than the due date from the PO schedule, plus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_ SHIP.SHIP_DATE_STATUS field with the value *3*.

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing On-Time Performance Details, page 67

Chapter 7, "Reviewing Supplier Performance," Common Elements Used in This Section, page 65

Viewing Quantity Performance Details

Access the View Vendor Shipment Performance - Quantity Performance detail page.

The system displays quantity performance summary information. This table displays the equations that the system uses to derive this page's metric fields:

Metric Name	Equation Used to Derive Metric
% Correct	Number of receipts minus overships minus underships divided by number of receipts.
% Over	Overships divided by number of receipts.

Metric Name	Equation Used to Derive Metric
% Under	Underships divided by number of receipts.
Number of Receipts	Total number of receipts for a specific item and vendor for a period (includes all items).
Over Ships	Number of receipts (by period) that are marked as over-received. **Note.** A receipt is marked *over-received* when the total quantity that is received for the PO schedule is greater than the PO quantity plus the receipt tolerance percent from PO_LINE_SHIP (obtained by default from PURCH_ITEM_BU or PURCH_ITEM_ATTRIB). Technically the system updates the PS_RECV_LN_SHIP.SHIP_QTY_STATUS field with the value *2*.
Under Ships	Number of receipts (by period) marked as under-received. **Note.** A receipt is marked as *under-received* when the total quantity that is received for the PO schedule is less than the PO quantity minus the receipt tolerance percent from PO_LINE_SHIP (obtained by default from PURCH_ITEM_BU or PURCH_ITEM_ATTRIB.) Technically the system updates the PS_RECV_LN_SHIP.SHIP_QTY_STATUS field with the value *3*.

See Also

Chapter 7, “Reviewing Supplier Performance,” Viewing Quantity Performance Details, page 70

Chapter 7, “Reviewing Supplier Performance,” Common Elements Used in This Section, page 65

Viewing Quality Performance Details

Access the View Vendor Shipment Performance - Quality Performance page.

The system displays quality performance summary information. This table displays the equations that the system uses to derive this page’s metric fields:

Metric Name	Equation Used to Derive Metric
% Reject	Rejected quantity divided by receipt quantity.
% Return	Returned quantity divided by receipt quantity.

Metric Name	Equation Used to Derive Metric
% Net Received	Receipt quantity minus rejected quantity minus returned quantity divided by receipt quantity.
% Defective	Rejected and returned quantities that you tag to be included in the quality metric (on the Return/Reject Reasons page in the Procurement Options menu).
Receipt Quantity	Sum of quantity that is received for all receipts for a specific item and vendor combination within a period.
Rejected Quantity	Sum of quantity that is rejected for all receipts for a specific item and vendor combination within a period.
Returned Quantity	Sum of quantity that is returned for all receipts for a specific item and vendor combination within a period.
Net Received Quantity	Receipt quantity minus rejected quantity minus returned quantity. This is a derived field and is not stored on any table within the system-it is available through the WV_PRCR_AAA_VW view.
Quantity Defective	Sum of rejected and returned quantities that you tag to be included in the quality metric (on the Return/Reject Reasons page in the Procurement Options menu).

Note. You can control at the setID level which return or reject reason codes are included in these equations.

See Also

Chapter 7, “Reviewing Supplier Performance,” Viewing Quality Performance Details, page 71

Chapter 7, “Reviewing Supplier Performance,” Common Elements Used in This Section, page 65

Viewing PO Versus Receipt Performance

Access the View Vendor Shipment Performance - PO/Receipt Quantity Performance Detail page.

The system displays quantity performance summary information based on the difference between the PO schedule quantities and the actual receipt quantities. This table displays the equations that the system uses to derive this page’s metric fields:

Metric Name	Equation Used to Derive Metric
% Received	QTY_PO (quantity ordered) minus QTY_OPEN (quantity open), divided by QTY_PO-derived from the PRCR_ITEM_HST table.
PO Quantity	Quantity ordered (as shown on the PO schedules) for *x* period in the graph and *x* item (on PRCR_ITEM_HST). The particular period that shows the ordered quantity is based on the PO schedule due date.
Open Quantity	This is the nonreceived quantity of the ordered quantity that is stored on PRCR_ITEM_HST and is determined regardless of when the receipts were made-in other words, it was the quantity received or not. Therefore a PO schedule for 100 could be due in June, and there are receipts in July for 25 and August for 25. The PRCR_ITEM_HST table should show a line for June with a QTY_PO of 100 and QTY_OPEN of 50.

See Also

Chapter 7, “Reviewing Supplier Performance,” Viewing PO Versus Receipt Performance, page 72

Chapter 7, “Reviewing Supplier Performance,” Common Elements Used in This Section, page 65

CHAPTER 8

Using PeopleSoft eSupplier Connection Pagelets

PeopleSoft eSupplier Connection includes pagelets for your suppliers to use. In this chapter, we discuss:

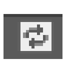
- Pagelets by functional role.
- Personalizing supplier-facing pagelets.
- Viewing supplier activities.
- Viewing supplier performance.
- Viewing supplier events.

Understanding PeopleSoft eSupplier Connection Pagelets

PeopleSoft eSupplier Connection provides portal pagelets for your corporate intranet or extranet home pages. These pagelets provide access to key data and transactions within PeopleSoft eSupplier Connection for use in supplier portal registries.

You and your suppliers can personalize the portal homepage by adding the pagelets that your suppliers need. Standards PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

Suppliers can configure their portal home page with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When you see two object names for a pagelet, the first one refers to the narrow version.



Click to refresh the pagelet data.

Click to customize the pagelet.

You can also design your own pagelets when your installation includes PeopleSoft Enterprise Portal.

See Also

PeopleSoft Enterprise Portal PeopleBook

Pagelet Security

Similar to page access, you control pagelet security at the component level by associating it with a permission list (which is then associated with a role); each pagelet has its own component to enable more granular access. (You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system, or object, name.)

We group our pagelets into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before your users can access them, or use the permission list definitions that we provide in our delivered sample data. We deliver sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

Pagelets by Role

We provide these supplier-oriented role groupings as examples of how to organize pagelet access by function.

In this section, we organize supplier-facing pagelets by these sample roles:

- Supplier-Application Administrator
- Supplier-Customer Service Rep
- Supplier-Warehouse Personnel

Note. The Supplier-External User role is associated with PeopleTools-related permissions that grant access to features such as personalization and navigation. This role (or one with similar permissions) must be present for any external-facing supplier user.

See Also

PeopleSoft Supply Chain Portal Pack 8.8 PeopleBook, "Introducing the PeopleSoft Supply Chain Portal Pack," Pagelet Security

Based on your corporate needs and willingness to share information externally, carefully consider which data (applications) as well as pagelets you want to make available to your suppliers.

Supplier - Application Administrator Pagelets

The Supplier - Supplier Administrator is an external facing role that has access to the core set of PeopleSoft eSupplier Connection functions. In addition, it enables the capability to create external users.

An internal or external user with the Supplier - Application Administrator role and its associated permissions can access all of these PeopleSoft eSupplier Connection product pagelets:

- On-Time Performance
- PO/Receipt Qty Performance
- Quality Performance
- Quantity Performance
- Recent ASNs

- Recently Dispatched POs
- Recently Dispatched RFQs
- Recently Dispatched Schedules
- Remaining Quantity Balances

Supplier - Customer Service Rep

The Supplier - Customer Service Rep role has general access to RFQ and Purchase order information including PO lookups, receipts and PO Acknowledgements in PeopleSoft eSupplier Connection.

An external user with this role and its associated permissions can access these PeopleSoft eSupplier Connection and Collaborative Supply Management pagelets:

- On-Time Performance
- PO/Receipt Qty Performance
- Quality Performance
- Quantity Performance
- Recently Dispatched POs
- Recently Dispatched RFQs

Supplier - Warehouse Personnel

This role enables a user to create advanced ship notices (ASNs) during the shipment process. An external user with the Supplier - Warehouse Personnel role and its associated permissions can access the Recent ASNs PeopleSoft eSupplier Connection pagelet.

Personalizing Supplier-Facing Pagelets

Your suppliers can personalize some of the supplier-facing pagelets.

In this section, we discuss personalizing user defaults.

Pages Used to Personalize Supplier Pagelet Defaults

Page Name	Object Name	Navigation	Usage
<Pagelet Name> - Personalize User Defaults	WV_PE_USR_DEF	Click the Customize button on these supplier-facing pagelets: On-Time Performance Quantity Performance Quality Performance PO/Receipt Qty Performance Recent ASNs Recently Dispatched POs Recently Dispatched RFQs	Users associated with multiple vendor IDs can select a default vendor and where applicable, define the maximum number of retrieved records (rows) to display on the pagelet.
Personalize User Defaults – Save Confirmation	WV_PE_SAVE_CONFIRM	Click the Save button on the Personalize User Defaults page.	Confirm the changed user defaults.

Personalizing User Defaults

Your suppliers can select default vendors, and in some cases, the number of rows to display on a pagelet.

Note. Your system administrator can further control the content and appearance of the supplier performance pagelets at the reporting entity or vendor-setID level.

Select a default vendor (this option is only available when the user is associated with multiple vendor IDs).

If the pagelet displays transaction IDs, select the maximum number of records (rows) to display on the pagelet.

See Also

Chapter 7, “Reviewing Supplier Performance,” Defining Supplier Performance Targets and Tolerances, page 62

Viewing Supplier Activities

In this section, we discuss how your suppliers can view their associated vendor account activities and access the source application pages using these pagelets:

- Remaining Quantity Balances
- Recently Dispatched POs
- Recently Dispatched RFQs
- Recent ASNs

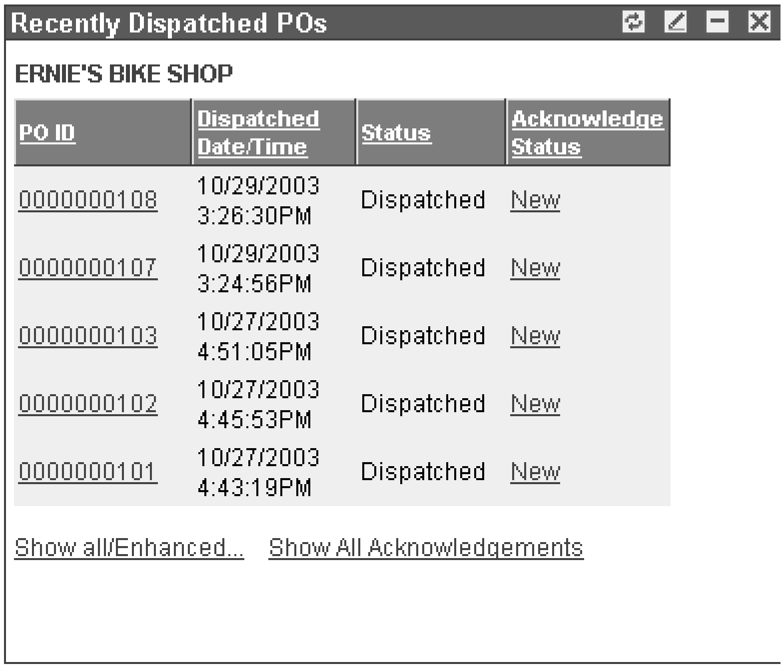
Pages Used to View Supplier Activities

This table provides details on PeopleSoft eSupplier Connection pagelets.

Pagelet Name	Roles	Audience	Usage	Enabling Applications
Recent ASNs (WV_PE_ASN_LIST)	Supplier -Applications Administrator, Supplier - Warehouse Personnel	Supplier	Displays shipment IDs from supplier-entered advance shipping notifications, shipping dates, and receipt lines.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Recently Dispatched POs (WV_PE_ORD_STAT)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays recent purchase orders, dates, status, and acknowledgement status.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Recently Dispatched RFQs (WV_PE_RFQ_PGLT)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays recently dispatched RFQs. You must first create RFQs in PeopleSoft Purchasing, and assign the RFQ to the vendor using the Dispatch Vendor List or the Item Supply Vendor List.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing

Recently Dispatched POs Pagelet

Access the Recently Dispatched POs pagelet.



Recently Dispatched POs

Displays recent purchase orders, dates, status, and acknowledgement status.

PO ID Click a linked value to access the Purchase Order Details page.

Acknowledge Status Click a linked value to access the Acknowledge Purchase Orders − Acknowledgement Details page and view or edit dispatched POs or online POAs (purchase order acknowledgements).

Show all/Enhanced Click to access the purchase order Filter Options page and enter the criteria to search for purchase orders.

Show All Acknowledgements Click to access the Acknowledge Purchase Orders − Search/Filter Acknowledgements page and search for specific POAs.

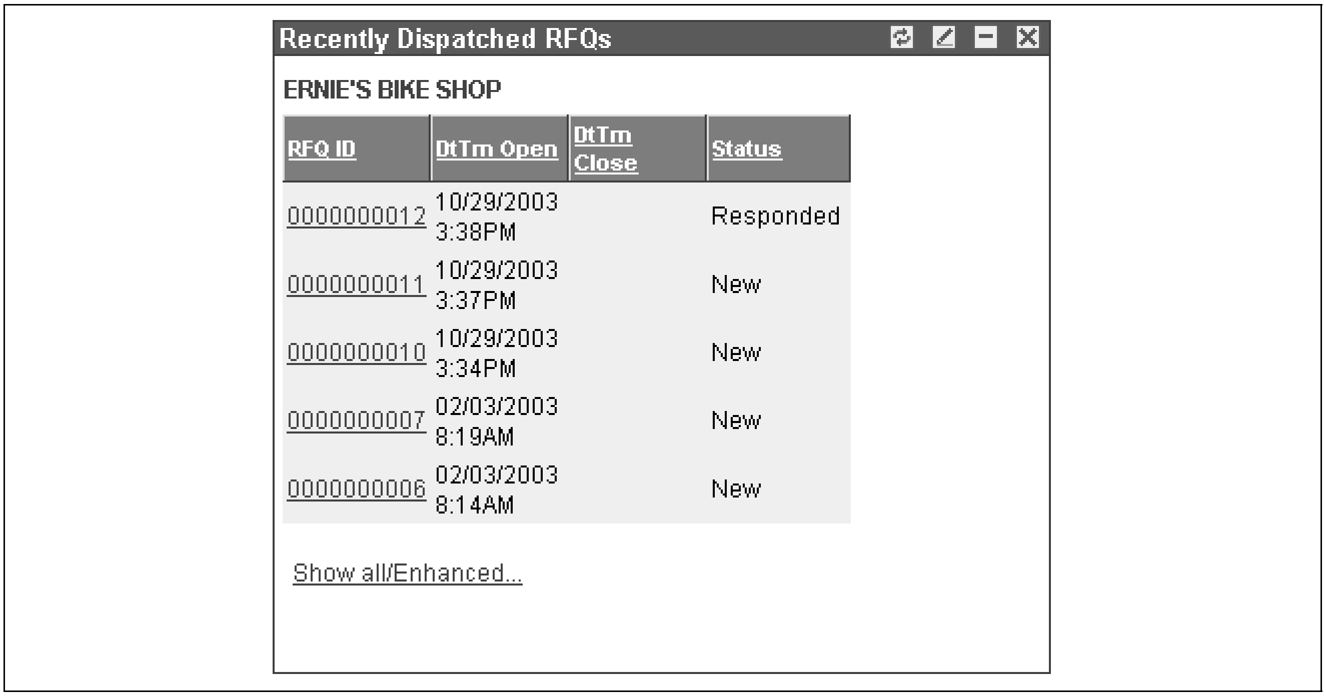
See Also

Chapter 4, “Acknowledging Purchase Orders Online,” page 23

Chapter 6, “Reviewing Supplier Account Activity,” Using the Purchase Order List, page 45

Recently Dispatched RFQs Pagelet

Access the Recently Dispatched RFQs pagelet.



Recently Dispatched RFQs

Displays recently dispatched RFQs. You must first create RFQs in PeopleSoft Purchasing, and assign the RFQ to the vendor using the Dispatch Vendor List or the Item Supply Vendor List.

RFQ ID — Click a linked RFQ ID value to access the Request For Quote List page.

DtTm Open, DtTm Close — The date and time when the RFQ becomes open or closed for vendor response.

Status

- *New*: The vendor has not entered a response.
- *Partially Responded:* The vendor has responded to some but not all of the line items on the RFQ.
- *Responded*: The vendor has responded to all of the RFQ's lines.

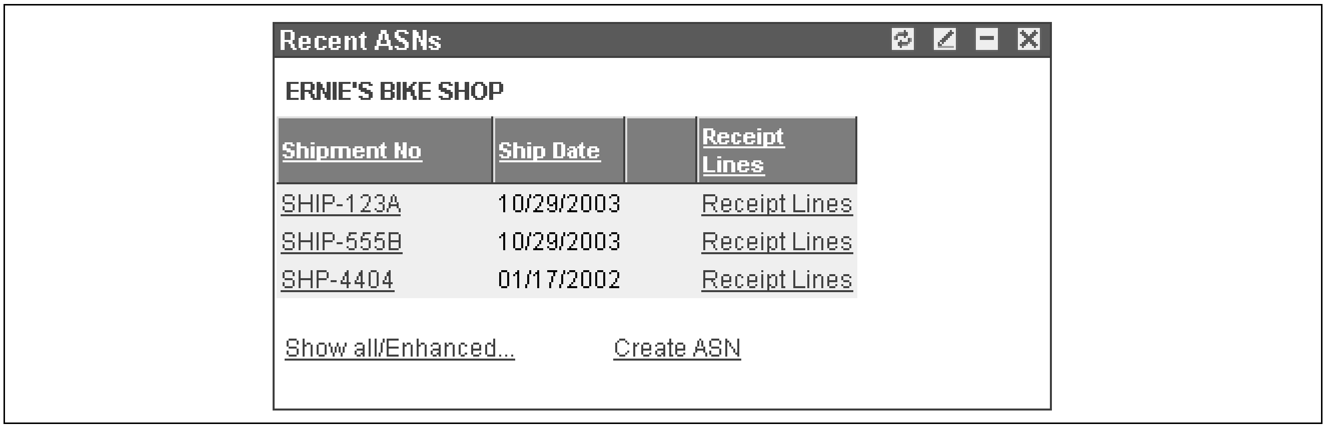
Show all/Enhanced — Click to access the Review Request for Quotes Filter Options page.

See Also

Chapter 3, "Maintaining RFQ Responses," page 13

Recent ASNs Pagelet

Access the Recent ASNs pagelet.



Recent ASNs

Displays shipment IDs from supplier-entered advance shipping notifications, shipping date, and receipt lines.

Shipment No (number) Click a linked value to access the ASN History − Line Details page.

Receipt Lines Click a linked value to access the Review Receipts − Receipt Lines page.

Create ASN Click a linked value to access the Advance Shipment Notification − Advance Shipment Creation page.

See Also

Chapter 5, “Creating Advanced Shipping Notices,” page 35

Chapter 6, “Reviewing Supplier Account Activity,” Reviewing Receipts, page 51

Viewing Supplier Performance

In this section, we discuss how your suppliers view performance metrics, using these pagelets:

- On-Time Performance
- Quantity Performance
- Quality Performance
- PO/Receipt Qty Performance

You can also control the content and appearance of the performance pagelets at the reporting entity or vendor level.

See Also

Chapter 7, “Reviewing Supplier Performance,” Defining Supplier Performance Targets and Tolerances, page 62

Chapter 7, “Reviewing Supplier Performance,” Viewing Supplier Performance Metrics, page 64

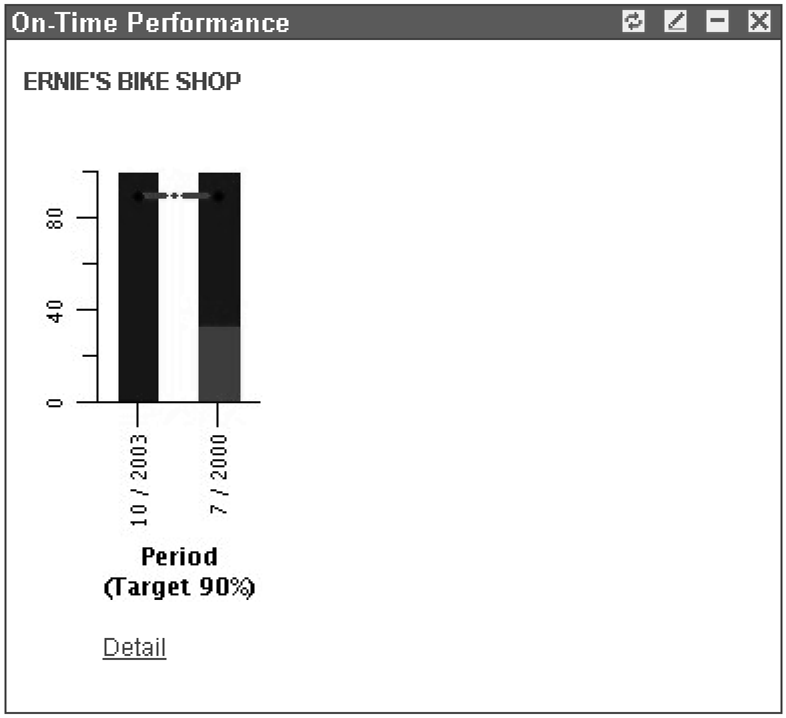
Pages Used to View Supplier Performance

This table provides details on PeopleSoft eSupplier Connection pagelets.

Pagelet Name	Roles	Audience	Usage	Enabling Applications
On-Time Performance (WV_PE_METRIC_1)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays the percentage and actual number of shipments that are on time, early, and late for all items within the period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
PO/Receipt Qty Performance (WV_PE_METRIC_4)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Quality Performance (WV_PE_METRIC_2)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing

On-Time Performance Pagelet

Access the On-Time Performance pagelet.



On-Time Performance pagelet

Displays the percentage and actual number of shipments that are on time, early, and late for all items within the period. The pagelet features a graph that displays the Percentage On Time metric, the vendor name, and target percentages by period.

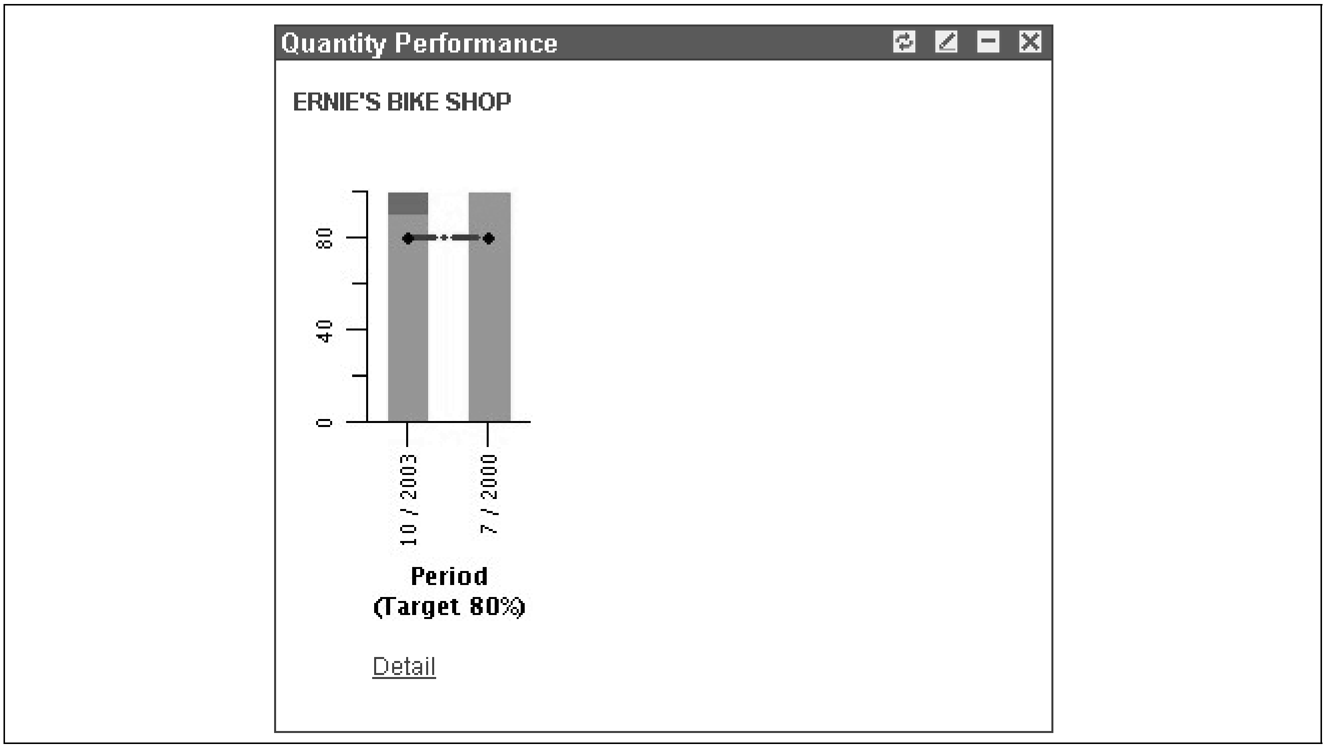
Click the Detail link to access the On-Time Performance page, and view the metrics used to derive this graph.

See Also

Chapter 6, "Reviewing Supplier Account Activity," Reviewing Receipts, page 51

Quantity Performance Pagelet

Access the Quantity Performance pagelet.



Quantity Performance pagelet

Displays the percentage and actual number of vendor shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period. The pagelet features a graph that displays the vendor name, percentage correct, under, and over, and target percentage.

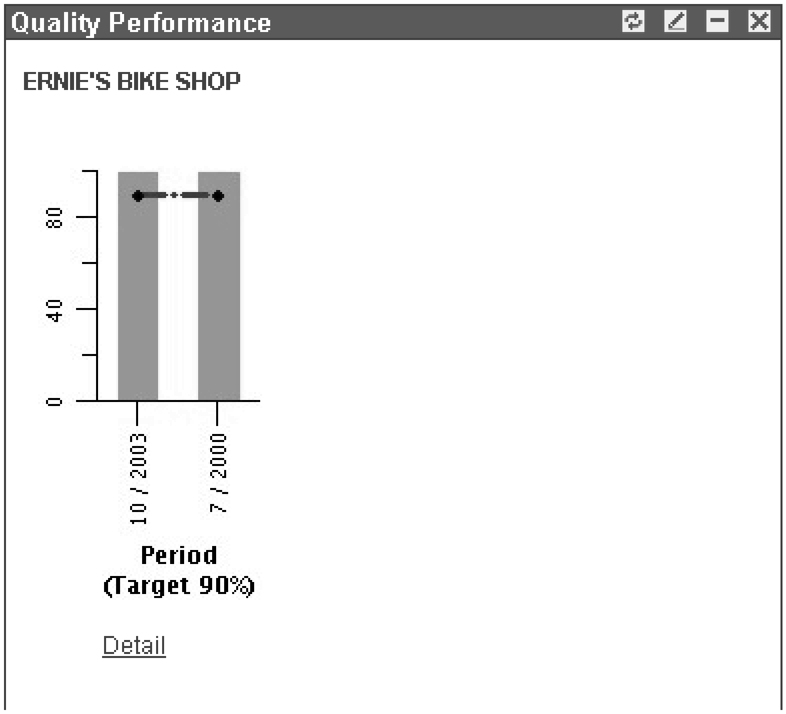
Click the Detail link to access the Quantity Performance page, and view the metrics used to derive this graph.

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing Supplier Performance Metrics, page 64

Quality Performance Pagelet

Access the Quality Performance pagelet.



Quality Performance pagelet

Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period. The pagelet features a quality performance graph that displays the percentage net received metric, vendor name, and target percentage.

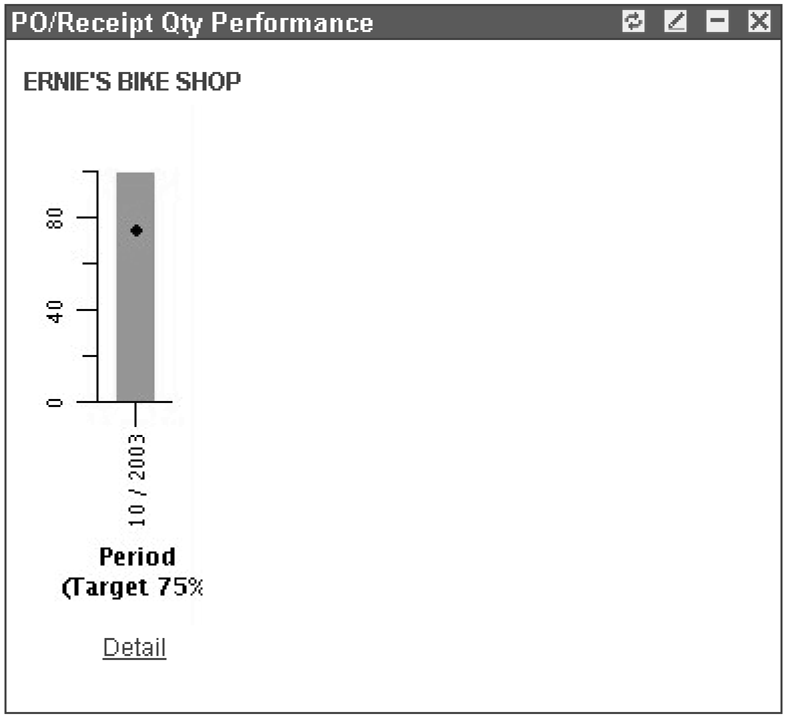
Click the Detail link to access the Quantity Performance page, and view the metrics used to derive this graph.

See Also

Chapter 7, “Reviewing Supplier Performance,” Viewing Quality Performance Details, page 71

PO/Receipt Quantity PerformancePagelet

Access the PO/Receipt Quantity Performance pagelet.



PO/Receipt Quantity Performance pagelet

Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period. The pagelet features a PO-versus-receipt quantity performance graph that displays the percentage Open Receipt Quantity metric, vendor name, and target percentage by period.

Click the Detail link to access the PO/Receipt Quantity Performance page, and view the metrics used to derive this graph.

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing PO Versus Receipt Performance, page 72

APPENDIX A

Delivered Workflows for PeopleSoft eSupplier Connection 8.8

This appendix discusses delivered workflows for PeopleSoft eSupplier Connection 8.8.

See Also

PeopleTools 8.44 PeopleBook: PeopleSoft Workflow

PeopleTools 8.44 PeopleBook: Using PeopleSoft Applications

Delivered Workflows for PeopleSoft eSupplier Connection 8.8

This section discusses eSupplier Connection workflows. The workflows are listed alphabetically by workflow name.

PO RFQ Dispatch

The section discusses the PO RFQ Dispatch workflow.

Description

Event Description	An RFQ is dispatched.
Action Description	Worklist Notification to a supplier user related to the vendor/location of the RFQ who is linked to the role Supplier -Customer Service Rep when the RFQ is dispatched. **Note.** This is in addition to an email dispatch.
Notification Method	Worklist

Workflow Objects

Business Process	PO_RFQ_DISPATCH
Activity	PO_RFQ_DISPATCH
Role	Supplier -Customer Service Rep

Notify Vendor

The section discusses the Notify Vendor workflow.

Description

Event Description	A PO is dispatched.
Action Description	Notifies vendor of PO dispatch if dispatch method is email. A link is included for supplier to access PeopleSoft Purchasing.
Notification Method	Email

Workflow Objects

Business Process	PO_EMAIL_DISP
Activity	NOTIFY_VENDOR
Role	Vendor

PO Acknowledgement

The section discusses the PO Acknowledgement workflow.

Description

Event Description	A purchase order is changed or rejected by a supplier and needs buyer review. Event can be triggered from EDI or the Supplier Portal.
Action Description	This provides confirmation to the buyer that the vendor has received a purchase order and that the vendor is suggesting changes to the purchase order. The buyer is directed to the Purchase Order Acknowledgements page to review/approve the PO.
Notification Method	Worklist

Workflow Objects

Business Process	PO_ACKNOWLEGEMENT
Activity	PO_ACKNOWLEGEMENT
Role	Buyer

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.

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